Certified as a Reg tion (or Regulations of the (Name of State Agency (Signature) (Title)

(Date)

MAIN OFFICE SACRAMENTO GI LBERT 2-4711 616 K STREET 14

LOS ANGELES OFFICE

MI CHIGAN 8411 MIRROR BUILDING 145 SOUTH SPRING STREET 12

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Harl Marren Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND DIRECTOR Sacramento 14 April 30, 1951

IN REPLY PLEASE REFER TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the Manual of Policies and Procedures -Aid to the Blind.

The regulations contained in this Manual were adopted by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.6, 3075 and 3460 on April 27, 1951, and are being filed in accordance with Section 11380 of the Government Code, to be effective June 1, 1951.

Very sincerely yours,

Charles I. Schottland

Director

FILED

in the Office of the Secretary of State of the State of California

Attachments

Sacramento 14 May 4, 1951

AID TO THE BLIND MANUAL LETTER NO. 1

Attached is a copy of the Manual of Policies and Procedures - Aid to the Blind which was adopted by the State Social Welfare Board on April 26, 1951, effective June 1, 1951.

This manual supersedes the following chapters of the Manual of Policies and Procedures insofar as they pertain to Aid to Needy Blind, Aid to Partially Self-supporting Blind Residents, and Prevention of Blindness:

Chanter	101 -	General Provisions	Chanter	170 -	Relatives
Chapter					Blindness
CARDON PROPERTY AND A STREET OF THE PROPERTY O		Residence	AND SECURE OF THE PARTY OF THE		Prevention of Blindness
40% 11 WOODER CONTROL TO SERVICE AND A SERVI		Real Property			Applications
		Personal Property			Investigation and Dicision
	THE COURSE WAS A STREET OF THE PARTY.	- Income	Chapter	350 -	Continuing Services
Chapter	155 -	- Amount of Grant	Chapter	700 -	State Case Numbers
Chapter	160 -	- Institution Inmates			

Regulations applicable in Aid to the Blind with respect to welfare personnel standards, social data reports, fair hearings, and statistical and financial procedures are contained in the following chapters of the present integrated Manual of Policies and Procedures:

```
Chapter 070 - Welfare Personnel Standards
Chapter 285 - Social Data Record
Chapter 325 - Fair Hearing
Chapter 500 - Statistical Procedures
Chapter 600 - Financial Procedures
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The following sections in Chapter 600, Financial Procedures, insofar as they relate to Aid to the Blind, have been incorporated in the Aid to the Blind Manual; these sections are also current in the present integrated Manual.

(20 20	(30 00	(77 70	616 27	677 07
610-10	610-80	611-70	645-31	671-27
610-20	610-90	611-80	670-75	671-30
610-30	611-00	611-90	670-77	671-31
610-40	611-20	611-95	670-79	671-50
610-50	611-30	612-00	671-20	674-00
610-60	611-50	627-10	671-25	674-05
610-70	611-55	627-30	671-26	
610-75	611-60	645-00		

The following department bulletins are obsolete, effective June 1, 1951:

400; 413; 420; 426; 436; 437; 443

The provisions of the following department bulletins, insofar as they relate to Aid to the Blind, have been incorporated in the Aid to the Blind Manual:

397; 401; 457

The following provisions in the Aid to the Blind Manual constitute changes in policy as contained in the Manual of Policies and Procedures:

- 1. Requiring that the notarization of Form Bl 206, Recipient's Affirmation of Eligibility, be mandatory instead of optional in view of the statutory provision regarding the sworn statements of the applicant or recipient as prima facie evidence. (Sec. B-234-c)
- 2. In redeterminations of eligibility, eliminating the need for further eye examinations when both eyes have been removed. (Sec. B-255)
- 3. Considering income tax refunds as personal property. (Sec. B-457-10b)
- 4. In APSB, considering a recipient ineligible for further aid when in redetermination he is found to have a regular monthly income of \$168.33. (Sec. B-542)
- 5. Setting forth the factors which require the added allowance of \$10.00 for blindness. (Sec. B-609)
- 6. Requiring the recording of oral requests for restorations. (Sec. B-651)
- 7. Reducing the number of forms to be submitted to SDSW. (Sec. B-666; B-703)
- 8. Eliminating the requirement that copies of documents sent in intercounty transfers be certified. (Sec. B-703)

In accordance with regulations adopted by the State Social Welfare Board on April 30, 1943, one copy of the manual is to be kept current in the office of each county welfare department for the use of the general public. It shall be labelled "For Public Use."

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Today, knowledge about blindness is replacing superstition, misunderstanding and even misdirected sympathy. Society's understanding of the problems incident to blindness has resulted in actions which have given to the blind a measure of equality with the sighted, that is, the right to independence, opportunity, and happiness. Knowledge has resulted in prevention, treatment, and rehabilitation.

Blindness means loss of sight—not loss of ability. A blind person wants to live a life on a basis as nearly comparable with his fellow—men as possible. He wants the economic opportunity to render himself free from economic insecurity, and the hazards to which he is exposed by reason of his blindness.

The State Legislature has given recognition to the fact "that the needs of blind persons may be different from the needs of aged persons." And it may be added, their needs are different from the needs of disabled persons or orphaned children. The provisions of the Welfare and Institutions Code are designed to assist the blind to become economically independent, or enable those who can no longer be so independent, to live with a greater measure of comfort, security, and dignity.

The public assistance workers will find in this manual a tool in their efforts to administer the Aid to the Blind Laws. But to carry out the purposes of these laws, in spirit as well as in letter, the workers must carry with them always an understanding of the problems of the blind. They must understand that a blind person needs most of all—the COURAGE to bear his deprivation; the HOPE that he may be useful to society and to himself; and the VISION that may yet be his.

Historical Background

In the long and heroic history of the care of the blind, sightless men and women achieved status in society as a result of the mass education of the blind made possible by the invention of Braille. But if it was education which changed the status of the blind, it has been the modern programs of governmental assistance which have given significance to that changed status.

When society first began to assume some responsibility for the care of the indigent, as expressed in the Elizabethan Poor Laws of 1572 and 1601, all the poor were "lumped" together. The problems of the blind were "treated" in the same way as were the problems of the orphan, the widow, the aged, the infirm, and the impoverished. Gradually, the public became conscious of the inadequacy of such a view. The feeling developed that to best meet the needs of those who required some form of assistance, a new and different attitude was necessary. Thus came the rise of the "categories" in the programs of public assistance for dependent children, the aged, and the blind.

INTRODUCTION

General

The study of blindness is the study of people, and its facets are as many as there are people who are blind. It is the study of people who are not only subject to the strains and stresses which befall each and all, but who must face such strains and stresses with the added handicap of blindness. Yet, in spite of this handicap, and in spite of society's indifference in the past, sightless individuals have made brilliant contributions in many fields of human endeavor, in industry, music, literature, and the arts. The measurement of a person is not found in his sight, no more than it is found in his hands or limbs. It is found in his courage, in his integrity, in his hope, and in his faith.

People were slow in recognizing the problems of those who, because of economic conditions or physical disabilities, were unable to provide for themselves and their families. Pauperism and beggary, and along with these, crime and degeneration, were often the results of man's failure to care for, or in other ways help relieve those who were unable to care for themselves.

Misfortune, whether a result of poverty or physical disability, is a relative thing. Among those whose poverty was most devastating, there were some who were less unfortunate than others. The poor man who had the use of his limbs could walk the miles to seek refuge or bread elsewhere. The sightless could flee nowhere without the additional hazards that go with blindness.

People perhaps justified the lack of constructive action because of a prevailing view that indigence and indolence went together. But they could not long hold this view regarding the problems of the blind. The blind man became a tolerated being in that he was left to seek by beggary the means to sustain himself and his family. The scorn or contempt shown to the poor was spared him. Man's conscience was touched, but not yet his understanding. Insight into the problems of the blind was still lacking.

In literature, the blind man became an object of sympathy, an idealized creature, but one still left to alms or asylums. To the sensitive blind, alms were even more crippling than the blindness; to the insensitive blind, alms became an end in beggary; and to society, the human wreckage that resulted became an irreparable loss.

A seventeenth century poet wrote of another poet of ancient times:

I can no more believe old Homer blind, Than those who say the sun hath never shined; The age wherein he lived was dark, but he Could not want sight who taught the world to see.

The writer was ahead of his time. Slowly, however, society began to see more into the problems of those who could not see. Amelioration at first came in the form of various types of aids—from the protective confinement of four walls to a financial pittance. But these aids did not add to human dignity, nor did they bring enhancement to society itself. Man cannot live by bread alone, and less so, can he live by alms alone.

General Operation of the Programs

The Aid to Needy Blind and the Aid to Partially Self-supporting Blind Residents programs are administered by the counties, and supervised by the State Department of Social Welfare. The Prevention of Blindness program is administered directly by the State Department of Social Welfare.

State Department of Social Welfare

The Welfare and Institutions Code set up in the State Government a Department of Social Welfare, consisting of a Social Welfare Board, a Director, and such divisions "as are or may be necessary for proper administration."

"The Department of Social Welfare shall have power to make administrative rules and regulations to enforce the provisions of this chapter, which rules and regulations shall not conflict with the provisions of this chapter and shall be binding upon the boards of supervisors of the various counties. All rules and regulations pertaining to the provisions of this chapter and Chapter 3 of this part shall be promulgated and construed separate and apart from other rules and regulations made by the department." (WAIC 3075)

County Administration

All aid granted under the Aid to Needy Blind Law and the Aid to Partially Self-supporting Blind Residents Law is administered by the counties of the State, and approved by the boards of supervisors of each county.

Financial Participation

The Aid to Needy Blind Program is a public assistance program which is financed by county, state, and federal governments. The Aid to Partially Self-supporting Blind Residents Program is financed by county and state governments. The Prevention of Blindness Program is financed solely by the State.

Other Services for the Blind

California provides a rich variety of practical services to advance the welfare of blind residents of this State, both children and adults. In addition to the several state programs for the blind, there is a large number of other resources of both a public and private character which offer special services to blind persons.

A NOTE ON APPLICABILITY

Except where otherwise indicated, all sections in this manual apply equally to the Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents programs.

In 1830, Indiana enacted a law "to provide for the support of the indigent blind of this State." Several other states followed with similar legislation. When, in 1935, the Federal Social Security Act was passed, some twenty-nine states had already enacted special programs of public assistance for needy blind individuals.

The Social Security Act, amended several times since its original enactment, was broadly liberalized in August 1950. It lent impetus to the states to pass laws to aid the needy blind, among others, and to further expand existing state services by providing federal funds in accordance with defined "matching bases" to any state which met the requirements.

In 1919, California enacted a law which empowered the counties to grant aid to needy blind persons. The law was ineffective not only because of the low grants involved, but because it was optional on the part of the counties to render or not to render aid. In 1928, as a result of an initiative measure, the Legislature approved an amendment to the Constitution giving it the power "to grant aid to needy blind persons not immates of any institutions supported in whole or in part by the State or any of its political subdivisions." The following year, a comprehensive statute was passed granting financial assistance to needy blind persons on a state-wide basis, with financial responsibility shared equally by the state and counties. Since July 1936, the Federal Government has participated in financing the Aid to Needy Blind program.

In 1941, the Legislature enacted a second category of public assistance for the blind—Aid to Partially Self-supporting Blind Residents. Later, legislation was passed to enable the state to operate a program for the prevention of blindness. Thus, the State of California, mindful of the interests of the blind, and desirous of alleviating or eliminating the hardships to which the blind are subject, has three programs in operation—Aid to Needy Blind, Aid to Partially Self-supporting Blind Residents, and Prevention of Blindness.

Public Welfare legislation in California is the democratic expression of the people to provide for those within their midst who are in need. The goal of this expression is the realization, by every citizen, of his greatest potentialities. The morale and self-respect of the individual members are as important as their physical existence. Therefore, the success of a democracy is measured by the welfare of its individual citizens.

The public welfare program in this state is an inseparable unity of state and county endeavor. Our mutual purpose is to provide for the relief and care of needy persons. While meeting the widest possible range of social needs we must, at the same time, recognize our responsibility to the community which has, through legislation, made the program possible.

To achieve this goal, it is necessary to have accurate and reliable determination and interpretation. This should grow out of uniformly efficient organizations whose common concern is the welfare of those they serve. Of equal importance is a respect for and understanding of human conduct. This understanding, without exception, is dependent upon a conscientious analysis of conditions, circumstances and personal variations.

B-005 (Continued)

B-005

"To achieve this objective, resources and income beyond the necessities of bare decency and subsistence are required. This chapter, by allowing the retention of necessary income and resources by those of the blind showing a reasonable probability of being able and willing to undertake the acquisition of resources and income necessary for self-support, will encourage them in their efforts to become self-supporting." (WAIC 3400)

B-010 ELIGIBILITY REQUIREMENTS -- GENERAL

B-010

Detailed analysis of eligibility requirements is given in the appropriate chapters of the Manual. The general requirements for eligibility for ANB and APSB are shown in the following chart:

	ANB	APSB		
Blindness	Visual acuity of 20/200 or less in the better eye, with the aid of the best possible correcting glass, OR Central visual acuity, if better than 20/200, shall be considered as blindness only when the peripheral field has contracted to such an extent that the widest diameter of the remaining visual field is not greater than 20 degrees.	Same		
Age	16 years	Same		
Residence	enter la company of the second			
1. County	No specified period	Same		
2. State	If blindness occurred while not a resident of this state, residence of 5 years of the 9 years immediately preceding the date of application, with 1 year's residence immediately preceding date of application.	10 years immediately preceding date of application.		
	If blindness occurred while a resident of this state, no prior residence required.	Same		
Citizenship	Not required	Same		
Personal Property	If single, or separated from spouse, personal property, less all encumbrances of record, must not exceed \$1200.00. If married and living with spouse, who is also an applicant for or recipient of ANB, the combined personal property, less all encumbrances of record, must not exceed \$2000.00.	owned if the total assessed value, less all encumbrances of record, does not exceed \$3500.00. Life insurance policies which have been in effect at least 5 years are not included, up to a maturity value of \$1000.00. Money placed in trust for funeral expenses,		
Real Property	The county assessed valuation of real property, less all encumbrances of record, must not exceed \$3590.00.	up to \$500.00, is not included.		
	Real property not used as a home must be utilized to meet the current needs of the applicant or recipient.			

B-005 PURPOSE OF ANB AND APSB LAWS

B-005

The people of California, through its elected representatives to the State Legislature, enacted an act known as the Welfare and Institutions Code in order:

"to provide for protection, care, and assistance to the people of the State in need thereof, and to promote the welfare and happiness of all the people of the State by providing public assistance to all of its needy and distressed. It is the legislative intent that assistance shall be administered promptly and humanely, with due regard for the preservation of family life, and without discrimination on account of race, religion, or political affiliation; and that assistance shall be so administered as to encourage self-respect, self-reliance, and the desire to be a good citizen, useful to society." (WAIC 19)

As an expression of California's recognition of the fact that blindness often makes it difficult for an individual to support himself, and renders his need for security much greater than that of persons with sight, the Legislature made the following statutory declaration:

"It is hereby declared that provision for public aid to the needy blind as in this code provided is a matter of state-wide concern, (WAIC 103.6)

and enacted an "Aid to Needy Blind Law" in order to

"....relieve blind persons from the distress of poverty, to enlarge the economic opportunities of the blind and to stimulate the blind to greater efforts in striving to render themselves self-supporting." (W&IC 3000)

The Legislature expressed its intent in Sections 3001 and 3002 of the W&IC as follows:

"The provisions of this chapter shall be liberally construed to effect its objects and purposes....

"It is recognized that the needs of blind persons may be different from the needs of aged persons."

The purpose of the APSB Law is:

"to provide a plan for this State whereby the blind residents of this State may be encouraged to take advantage of and to enlarge their economic opportunities, to the end that they may render themselves independent of public assistance and become entirely self-supporting.

B-020

All aid given under the ANB and APSB laws shall be absolutely inalienable by any assignment, sale, attachment, execution, or otherwise, and in case of bankruptcy, the aid shall not pass through any trustee or other person acting on behalf of creditors.

Recipients have absolute right to their full grant of aid. Legal compulsion is shall not be used to divert the aid. (W&IC 3008, 3407; AGO NS1382) (See Sec. B-605, Money Payments and Restrictive Payments)

B-025 SOLICITATION OF ALMS

B-025

No person who publicly solicits alms shall be eligible to receive aid.
"Publicly solicits" shall be construed to mean either wearing, carrying, or
exhibiting signs denoting blindness for the securing of alms, or carrying receptacles for the purpose of securing alms or doing the same by proxy, or stationary
or house to house begging; or any other means of publicly seeking alms. (Walc 3046, 3446)

B-030 CONFIDENTIAL NATURE OF RECORDS

B-030

A. Principles of Confidentiality

It is the right of a person to feel that when his problem is presented to another person, the information so shared will be held in strictest confidence. In social work, the confidential relationship between the worker and the client is inviolate.

In professional relationships, the confidential nature of records is a fundamental principle. It is based on the respect and dignity to which every individual is entitled. Many individuals reveal information under the stress of need which they would not otherwise disclose. It may be detrimental to their interest or to the public interest to have such information disclosed.

B. Statutory Requirements

Although in other professions, the principle of considering records as confidential is voluntarily adhered to, it is made mandatory in the profession of social work by State and Federal Statute.

In California, the law requires that:

"Except as otherwise provided in this section, all applications and records concerning any individual made or kept by any public officer or agency in connection with the administration of any

(Section Continued on Next Page)

larification

B-010 (Continued)

	ANB	APSB
Property Transfer	Must not have made a voluntary transfer of property to qualify for aid.	Same
Relatives	Responsible relatives are the spouse, parent, or adult children residing within the state and financially able to assist.	Same
Soliciting Alms	Must not solicit alms	Same
Institutional Residence	Persons living in public institutions may apply for aid, but must leave the institution after the receipt of the first monthly payment.	Same
Income	All income must be considered in determining the amount of the grant, except that a net monthly <u>earned income</u> not exceeding \$50.00 is exempt from such consideration.	Exempt annual income of \$1000 plus one-half of the excess thereof is allowed in determining the amount of the grant.
Plan for Self- support		The individual must have a reason- ably adequate plan for self-support and give evidence that he is at- tempting to carry out that plan through a sincere and sustained effort.

B-015 NO PAUPER DESIGNATION

B-015

No person shall be deemed a pauper because of the receipt of ANB or APSB. The laws governing such aid are separate and apart from the law for the aid and relief of indigents.

Warrants drawn in payment of aid shall not carry any reference to indigency or pauperism, and shall not include any word or abbreviation indicative of aid, assistance, charity, needy, support, welfare, or words or abbreviations of similar connotation. The program titles Aid to Needy Blind or Aid to Partially Self-supporting Blind Residents and the abbreviations ANB or APSB shall not appear on the warrant nor shall the fund designation appear on the warrant if it includes such words as welfare, security, relief, indigent, etc. (Walc 3002, 3401.5)

B-030

Any person requesting information as the authorized representative of the applicant, recipient or of the appellant in an appeal shall have written authorization from such person for release of information from the record. The period of time for which an authorization is effective is dependent upon its wording. An authorization to release information pertaining to "application, or assistance, or appeal" is effective until revoked, while an authorization pertaining to "my appeal" refers only to the appeal and automatically expires at the time of disposition of the appeal. The information to be released also depends upon the content of the authorization.

An authorization may be made for release of information to an individual, corporation, or association. The county shall honor such an authorization provided the person presenting it is identified, to the satisfaction of the county, as being the individual or a bona fide representative of the corporation or association.

If the applicant, recipient, or appellant is present with another person, written permission authorizing release of information to that person is not necessary.

F. Nature of Information Which May Be Released to Certain Agencies

Information may also be released under the following conditions:

- 1. If it is requested by a public or private social welfare or health agency which:
 - a. As a part of its usual duties, makes social investigations for the purpose of rendering social service.
 - b. Maintains adequate standards for the protection of confidential information.
 - c. Will use the information only for purposes reasonably related to the purposes of the program and the functions of the inquiring agency.
- 2. If it is requested for research purposes, provided that such research will not result in the disclosure of the identity of the applicant, recipient or appellant.
- 3. If it is requested by a selective service board, provided there is assurance of reasonable precaution to protect the confidential nature of records by that board.

(Section Continued on Next Page)

102-70 Restated

B-030

B-030 (Continued)

provision of this code relating to any form of public assistance for which grants in aid are received by this State from the United States Government shall be confidential, and shall not be open to examination for any purpose not directly connected with the administration of such provision of this code.

"Except as otherwise provided in this section, no person shall publish or disclose or permit or cause to be published, or disclosed any list of persons receiving any such public assistance.....Any violation of this section is a misdemeanor...." (Walc 118)

C. Purpose of Confidentiality

The objectives of the principles of the confidential nature of records are to:

- Develop a relationship of confidence between the applicant or recipient and the agency.
- 2. Develop a relationship of confidence between the public and the agency.
- 3. Protect the rights of applicants or recipients against identification, exploitation, embarrassment, and possible prosecution or judgment, except when such action is taken in accordance with due process of law or when the enforcement of public welfare law is concerned.

D. Nature of Information Considered Confidential

Applications and county records shall be confidential and shall not be open to examination for any purpose not directly connected with the administration of the program. This includes names, addresses, and information concerning the condition or circumstances of any persons from whom, or about whom, information is obtained, whether or not such information is recorded.

102-70 Restated

General information, not identifiable with any particular individuals, such as total expenditures made, number of recipients, and other statistical information and social data contained in general studies, reports, or surveys of program problems would not fall within the scope of confidential material to be safeguarded.

E. Release of Information Upon Applicant's or Recipient's Request

Information shall be released upon the request of the applicant or recipient, or the designated agent of such person, except if the information requested was given confidentially by another person or pertains to another person not included in the application or aid payment, unless that person's consent to the release of information is also secured.

B-040 ORGANIZATION OF THE MANUAL OF POLICIES AND PROCEDURES AID TO THE BLIND

B-040

The Manual of Policies and Procedures—Aid to the Blind—is one volume of the total Manual of Policies and Procedures which will cover, in separate volumes, all programs of the SDSW.

This manual is divided into chapters as follows:

Introduction

Chapter		General Provisions
Chapter	II	Application Process
Chapter	III	Determination of Eligibility
Chapter	IV	Blindness
Chapter		Age
Chapter	VI	Residence
Chapter	VII	Property
Chapter	IIIV	Institutions
Chapter	IX	Income
Chapter	X	Relatives
Chapter	XI	Aid Payments
Chapter	XII	Inter-county Transfer Procedures
Chapter	XIII	Appeals
Chapter	VIX	Financial Participation
Chapter	VX	Prevention of Blindness
Chapter	IVX	Services for the Blind

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Manual Letters

B-045 SALE OF THE MANUAL OF POLICIES AND PROCEDURES BY SDSW AID TO THE BLIND

B - 045

Copies of the Manual of Policies and Procedures—Aid to the Blind, may be purchased from the State Department of Social Welfare, 616 K Street, Sacramento, California, for \$1.00, plus state sales tax. The price of one year's subscription to revisions (which includes Department Bulletins) is sixty cents. Both prices are payable in advance. If a certified or cashier's check or money order is used for payment, it shall be made payable to the State Department of Social Welfare.

(Walc 114.3)

102=77 Restated B-030 (Continued)

B-030

G. Subpoena or Court Order for Release of Information

The county welfare department may receive a subpoena or other order from a court requiring that records be produced. Unless it is readily apparent that the court order was issued for a purpose directly connected with the administration of the program, counties other than Los Angeles, Sacramento, or San Francisco shall immediately upon receipt of such order, notify the district attorney or county counsel, with the request that this officer take appropriate action to safeguard the confidential nature of the record. Los Angeles, Sacramento, and San Francisco counties shall either telephone the local office of the SDSW which will arrange that the attorney general's office take action, or notify their district attorney or county counsel. (WAIC 115, 118)

H. Inspection of Records by Applicant or Recipient

All papers and records pertaining to his case on file in the SDSW or in the county office shall be open to inspection at any time during business hours by the plant, recipient, or his attorney or agent. (Walc 118, 3075, 3079, 3460)

B-035 SEPARATE CASELOADS FOR AID TO THE BLIND

B-035

Any county which has a caseload of 150 or more recipients of ANB and APSB may establish a special bureau to be devoted exclusively to the administration of aid to the blind.

The creation of separate caseloads for the blind recognizes the principle expressed in the Welfare and Institutions Code "that the needs of blind persons may be different from the needs of aged persons." (WAIC 3002) It is also a recognition of the basic objectives of the laws granting aid to the blind. These objectives require counseling and guidance toward a goal of self-support, encouragement in plans for rehabilitation, and assistance in making physical, social, and economic adjustments to blindness. They require an understanding of the total personality of the individual.

These objectives can more readily be achieved by means of separate and smaller caseloads. Smaller caseloads will facilitate individual concentration with a view of assisting the recipient to make maximum use of his potentialities in order to decrease or eliminate his dependency. (W&IC 3079.5)

B-105 (Continued)

B-105

An understanding of the conditions of eligibility and the information necessary to establish eligibility are essential to the applicant. This information shall be given to him, as nearly as possible, in terms adapted to the applicant's experience and understanding, and shall include a discussion as to:

1. The eligibility requirements of the aid which he is seeking. If he appears to have eligibility for another assistance program, then both shall be explained.

An applicant who is definitely ineligible for the categorical aid programs may be found eligible for other forms of aid granted by the county or by other public or private social agencies in the community.

- 2. The process of determining eligibility, such as the more common ways of gathering information, the interview, personal documents, etc., and the applicant's role in the process.
- 3. The confidential nature of records regarding not only the applicant but all persons related to the determination of eligibility.
- 4. The way in which the grant is computed.
- 5. The unrestricted right to use the grant given to him in any way he desires.
- 6. The right to a fair hearing.
- 7. The responsibility which the applicant has to inform the agency of any change in address or circumstances affecting his eligibility. (W&IC 3075, 3460)

B-110 COUNTY RESPONSIBILITY IN THE APPLICATION PROCESS

B-110

The county's responsibility in the application process is to receive applications, or requests for restorations, to assist applicants in securing evidence of eligibility, to determine eligibility or ineligibility, to authorize and assure issuance of payments to eligible blind persons, provide information as to availability of services by other agencies, and provide such other services as the individual may require, and the county may be able to render. (WAIC 3026, 3081, 3421)

B-105

B-105 THE APPLICATION PROCESS

The provisions of the ANB and APSB Laws require that the essential facts of eligibility be determined. This process begins when the applicant makes his need for aid known to the county. It is completed with the decision as to his eligibility. The application is approved when the determination is completed and eligibility is definitely established. The application is denied at any point in the determination where ineligibility is definitely established.

The first step in the process is the application interview, the purpose of which is to determine if there is a sufficient presumption of eligibility to justify further determination. It is an especially important interview because the impression received by the applicant is carried over to future county relationships. The person may not know the kind of assistance he desires or the exact nature of the aid which he requests. This interview provides an opportunity for the mutual discussion of the applicant's needs and the type of assistance the county is equipped to render, under the laws, rules, and regulations within which it operates. These laws, rules, and regulations which place the agency in a position of advantage, may be bewildering to the applicant. These must be used in assisting him to exercise his right to claim assistance and to receive it if eligible. The interview is not something routine, nor is it something inflexible. On the contrary it is one which takes into consideration the fact that every individual is different. It is adjustable to the varying circumstances of each individual applicant and to his emotional attitudes.

In the case of a blind person, the application interview takes on added significance. This person comes to the agency for the assistance or service it may be able to render to him not always on the basis that his employment powers have been impaired because of age, nor on the basis that he is orphaned and has mone to provide for him. He comes to the agency on the basis of a handicap-loss of sight -- which has not only deprived him of the ordinary pleasures and opportunities available to most, but which has set him apart as an individual more exposed to the natural hazards of life than are other individuals,

An interview with a blind person requires great skill, tact, and understanding. Unable to see the person in front of him, he is more inclined to show greater sensitivity because of the inflection in the speaker's voice or the grip of his handshake, or the sound of a far-away movement. The speaker cannot depend on a smile to soften the effects of a harsh statement. Nods, shrugs, and gestures cannot take the place of words, and words and the tone of the voice are clues to the speaker's mood. The blind person needs the assurance that a sincere effort is being made to understand his problem and to render to him the service it is possible for the agency to render.

B-120 (Continued)

B-120

c. A request for information is one which is unrelated to a specific request for aid. It is made without the individual indicating that he is in need. He may only desire to obtain information relative to the aid programs or points of agency policy. Such requests will usually be made by callers seeking information who are either (1) clearly not presumptive applicants, i.e., the general public, or (2) not willing to identify themselves. Note that a request for information may, in the course of an interview, develop into a request for aid.

The record of requests for aid shall be filed so as to be readily available for review and shall include the following information.

- 1. Aid program
- 2. Name and address of the applicant
- 3. Date of request
- 4. Nature of request
- 5. Disposition of request
- 6. If no application is signed, the reason the applicant did not continue with the application.

If a request for aid is made but the application is not signed, the information secured during the interview shall be recorded in a manner which will be helpful in the event of a later application or a complaint. (See Sec. B=175, County Card Files and Controls) (Walt 3075, 3460)

B-125 RIGHT TO MAKE APPLICATION

B-125

Any person who believes that he meets the requirements for aid has the right to apply for such aid and his application shall be received by the county. (See Sec. B=130, Right to Make Reapplication)

One who believes that he meets the eligibility requirements of more than one category of aid has the right to choose the type of aid for which he will apply.

The county shall upon request and without charge immediately mail application blanks for aid to any person in the county.

If the individual who is physically unable to apply in person, and who does not mail in his application, makes known to the county his desire to make application, the county shall, as soon as possible, call at the home to secure the application, Form Bl 200.

An applicant who is under 21 years of age shall make and sign an application on his own behalf, unless a guardian has been appointed for him. (Ward 3075, 3080, 3460)

201= Resta

201-20 Restated

Hestated

210 Resta

215-00 Restate

B-115

B-115 APPLICATION PROCESS--DEFINITIONS

Application: A request for aid is considered an application when the Application, Form Bl 200, has been completed, signed by the applicant, acknowledged, and filed with the county.

Reapplication: A reapplication is a request for aid received by the county from or on behalf of a person (a) whose former application has been denied or has been voluntarily withdrawn, or (b) whose aid has been discontinued for a period of twelve months or more. A new application, Form Bl 200, is required for each reapplication except as provided in Sec. B-140, When Application is to Be Taken.

A request for aid is considered a request for restoration if aid has been discontinued in the same county for a period less than twelve months. (Watc 3075, 3460)

B-120 REQUESTS FOR AID

Restoration:

B-120

A written record of all requests for aid shall be kept, even though the application form is not signed.

"Requests for aid" and "Requests for restoration of aid" may be made orally (in person or by telephone) or in writing.

- a. A request for aid is made when the individual indicates that he is in need and asks for financial assistance. If he lacks sufficient information to be specific about the aid program for which he might qualify, the county shall provide the necessary information. The requirement for recording shall apply to telephone requests only when the individual specifies the aid program for which he wishes to apply.
- b. A request for restoration of aid is made when the individual indicates that he is in need, and that he had previously received aid (in the county to which he is making his request) which had been discontinued less than twelve months prior to the date of the request for restoration.

B-140 (Continued)

B-140

- 4. If the SDSW finds that an appellant is eligible on degree of blindness. The appeal may be from either denial or discontinuance of aid. If the appeal is from denial of aid, a completed Certificate of Verification of Eligibility, Form Bl 201, shall be submitted to SDSW. If the appeal is from discontinuance of aid, Notice of Change, Form Bl 232, shall be submitted.
- 5. If the SDSW finds, upon subsequent eye examination, that an individual whose aid had been previously denied or discontinued for less than twelve months, because of insufficient blindness, is found eligible as to degree of blindness.
- 6. If request for restoration is made within twelve months following the date of denial or discontinuance.

Aid may be granted under ANB or APSB on an application taken for either program unless aid has been denied or discontinued for twelve months or more. (Walc 3075, 3460)

B-145 WITHDRAWAL OF APPLICATION

B-145

An applicant may withdraw his application at any time prior to action by the board of supervisors. A request for withdrawal of an application shall be made upon the applicatn's own initiative and in writing. Withdrawal may occur if the applicant believes himself to be ineligible, or for some other reason wishes the determination of eligibility discontinued. The reason for withdrawal, if known, should be recorded in the county record in a manner which will be helpful in the event of a reapplication or a complaint.

Action of the board of supervisors is not necessary on withdrawn applications, and when an applicant dies before the determination is completed. Latter applications are considered canceled.

Form DPA 8, Notice to Applicant Who Withdraws Application, shall be given or mailed to the applicant who withdraws his application, except for counties in which the board of supervisors takes denial action on withdrawn applications. A copy of the notification shall be retained in the case record.

If a withdrawn application is denied by the board of supervisors, the applicant shall be notified of this action on Form Bl 239, Notification of Action by Board of Supervisors. (Walc 3075, 3084, 3085, 3460, 3472)

325-00 Restated

B-130 RIGHT TO MAKE REAPPLICATION

B-130

An applicant whose application for aid has been denied by the county, or whose appeal has been denied by the board of supervisors or SSWB, may not again apply for such aid until the expiration of one year from date of the previous application, except with the county's consent or on order of the SDSW, or until the condition because of which his application or appeal was denied, has been eliminated. The county shall accept such reapplication if a change in the applicant's circumstances may have rendered him eligible or on the presentation of new evidence regarding eligibility. (W&IC 3088.5, 3474.5)

B-135 PLACE OF MAKING APPLICATION

B-135

The application may be completed in the county office, in the applicant's home, in an institution, or in any other place satisfactory to the applicant.

B-140 WHEN APPLICATION IS TO BE TAKEN

B-140

The Application, Form Bl 200, shall be signed by the applicant (and acknow-ledged by a properly qualified official) at the time when he first makes his need known, unless he does not desire to continue with the application. The applicant may realize that he is not eligible, or for some other reason may choose not to continue with the application. Persons who are obviously ineligible shall be permitted to sign an application if they wish to do so.

If aid has been denied, or if it has been discontinued for a period of more than twelve months, or if aid is being transferred from one county to another, a new application shall be completed, except in any one of the following instances:

- 1. If an application has been denied erroneously; i.e., if the county had information that the person was eligible but the application was denied because this information was misinterpreted or overlooked, or if the application was denied before all reasonable sources of information as to eligibility had been exhausted.
- 2. If aid is granted on appeal to SSWB.
- 3. If the board of supervisors after a hearing rescinds its former denial action.

B-155 (Continued)

B-155

One who is guardian of the estate only has no responsibility for the person or whereabouts of his ward. His signature and that of the ward are required on Forms Bl 200 and Bl 206, or other documents relating to both the person and to the financial affairs of the ward. The signature of the guardian of the estate is the only signature required on documents pertaining solely to the finances and property of the ward such as authorization for financial investigation, property conveyances, financial contracts, warrants, etc. If aid is granted, the warrants shall be made out to the guardian of the estate and shall be delivered to and endorsed by him. Only his endorsement of such warrants is valid.

A guardian of both the person and estate has entire responsibility for the person of the ward and his financial affairs. Only his signature is valid on any and all documents relating to the ward or his financial affairs. (PROB. C 1460 ET. SEQ.)

If a guardian of the person or of the estate, or of both the person and the estate, has been appointed prior to the date aid is granted, Summary of Letters of Guardianship (Form DPA 5) shall be obtained.

If a guardian is appointed subsequent to the granting of aid, report shall be made to the SDSW in accord with the following procedure:

- 1. Guardian of the estate (or person and estate)—A Notice of Change (Form Bl 232) reporting the change of payee effective with the first of the month following the date letters of guardianship were issued shall be submitted to the SDSW.
- 2. Guardian of person only-Form DPA 5 shall be completed during the next annual redetermination.

If a recipient who has a guardian of the person, or the estate, or both, moves to another county and transfer arrangements are initiated, it shall be the responsibility of the first county to notify the second county of the guardianship by attaching a copy of Form DPA 5 to the Notification of Transfer (Form Bl 215), forwarded to the latter county.

If the letters of guardianship are vacated and a recipient's guardian discharged, or guardianship is terminated by the death of guardian, the county shall notify the SDSW immediately giving date of termination. Notification shall be made by submission of Form Bl 232. If the guardian was of the estate or of the person and estate, the Form Bl 232 shall report the change in payee.

B-150 CHANGE OF COUNTY RESIDENCE WHILE APPLICATION IS PENDING

B-150

If county residence is changed after an application has been signed but prior to board of supervisors' action, the county in which the application was filed shall be responsible for completing the determination of eligibility and granting aid in the amount for which the applicant is eligible. Reimbursement shall be claimed on a non-county basis.

The county granting the application shall make immediate arrangements for transfer of responsibility for payment of aid to the county in which the recipient established residence. The counties involved shall agree upon the date of discontinuance by the first county. The second county shall assume responsibility for payment of aid on the earliest possible date and claim reimbursement on a noncounty basis until one year of residence has been acquired (six months for one who became blind while a resident of the state). There shall be no lag or overlapping between the date of discontinuance by the first county and the beginning date of aid in the second county. (See Sec. B-322, Non-county Residence Procedure) (Walt 3042; 3075, 3432, 3460)

B-155 GUARDIANSHIP

B-155

If a guardian makes application, the full name of the applicant should be used at the top of the form. For the signature at the bottom of the blank the guardian should sign his own name as legally appointed guardian of the applicant; e.g., John Doe, legally appointed guardian of Richard Roe. The signatures of both the guardian and the applicant are required at the bottom of the blank unless the guardian is guardian of the person and the estate in which case only the guardian signs.

Guardians are appointed for persons adjudged unable to manage and care for themselves or their property without assistance. Only a person who has been granted letters of guardianship by a court of competent jurisdiction may act as guardian.

One who is guardian of the person only may not act for his ward in financial matters. Therefore, the signature of both the ward and the guardian of the person are required on the Application (Form Bl 200), Recipient's Affirmation of Eligibility (Form Bl 206), or other documents relating both to the person and to Eligibility (Form Bl 206), or other documents relating both to the person and to the financial affairs of the ward. The signature of the guardian of the person is the only signature required on affidavits or other documents pertaining to the person or whereabouts of the ward such as age, citizenship, residence, etc. Guardianship of the person does not affect the payment of aid, and warrants shall be made payable to the recipient whose signature remains valid on all financial documents.

B-160 (Continued)

If the applicant has already been given a leave of absence and is living in the county in which he had residence at the time of commitment, application shall be made by him to the local county welfare department. If the applicant has a guardian, the application shall be signed by the guardian as indicated in Sec. B 155, Guardianship. The application shall be processed as any other application. The SDMH does not participate in completion of the application or the determination of eligibility.

If an applicant has already been given a leave and is living in a county other than that in which he had legal residence immediately prior to the commitment, the county in which he lives shall accept the application on behalf of the responsible county. The county in which application is made shall interview the applicant and give all necessary assistance in the establishment of eligibility.

The county of residence is responsible for the usual determination of eligibility and for completion of the Certificate of Verification of Eligibility (Form Bl 201) and other required forms in accordance with information obtained during the determination of eligibility, and for the payment of any fees required in connection with the determination of eligibility, such as for eye examination.

The SDMH assumes full responsibility for the release and the welfare of the patient on leave; will have a guardian of his estate appointed, when indicated; select the home in which the patient on leave is placed; transfer him to the home; and give personal supervision in the home.

If additional information is necessary in connection with the application of one who is an inmate of a State hospital but awaiting leave, the social worker of the SDMH shall be asked to obtain information from the applicant or to make collateral calls in the county in which the institution is located.

If the applicant is in a State hospital awaiting leave and the determination indicates eligibility, the county of residence shall, just prior to board of supervisors' action, write to the State hospital for verification of the fact that a plan has been completed for the applicant to leave the institution as soon as aid is granted. (Some applicants for aid are not given leave until aid has been granted.)

(Section Continued on Next Page)

230-85 estated B-155 (Continued)

B-155

The costs of guardianship, i.e., court costs, attorney and bonding fees, etc., do not constitute a need of the individual to be considered in determining the grant of aid, and such costs may not be paid from the grant of aid.

Aid shall not be granted to a ward if the guardian of his estate is an employee of the county welfare department. Aid may be granted to a ward whose guardian of the estate is an employee of the SDMH provided the ward is otherwise eligible. (W&IC 3075, 3460)

B-160 APPLICATION OF PATIENT ON LEAVE FROM STATE HOSPITAL

B-160

The application procedure of persons about to be given a leave of absence from state hospitals shall be as outlined below. It shall apply to the applicant for whom a guardian has been appointed and to the one who has no guardian.

- 1. Prior to release of the person on a leave of absence, the SDMH shall refer the request for aid to the county in which the inmate had residence at the time of commitment. The referral shall be by letter giving a resume of the social data in the institution's records. In addition the letter shall contain the following.
 - a. A statement that the applicant is ready for a leave of absence and whether a guardian has been, or is to be, appointed. (If it is determined that guardianship is necessary the guardian should be appointed before the application is signed.)
 - b. Information as to the home placement which will be available when eligibility for aid is established.
- 2. The county of residence shall send the application (Form Bl 200) to the SDMH. The SDMH is responsible for securing a signed, properly acknowledged application. If a guardian has been appointed he shall sign the Form Bl 200 and a copy of the letters of guardianship shall be sent to the county. The application interview is taken by a social worker of the SDMH who transmits the Form Bl 200 and a record of the interview to the county of residence.

B-165 (Continued)

B-165

If the parolee lives in a county other than that in which he had legal residence immediately prior to the commitment, the county in which he lives shall accept the application (Form Bl 200) on behalf of the responsible county. The county in which application is made shall interview the applicant and give all necessary assistance in the establishment of eligibility. This includes forwarding the completed application and other documents which require the applicant's signature, all available proof relating to blindness, or other points of eligibility.

The county of legal residence is responsible for assembling all information pertinent to eligibility prior to preparation of the Certificate of Verification of Eligibility (Form Bl 201), and for the payment of any fees required in connection with the determination of eligibility; for example, an eye examination fee for the applicant. (Waic 3075, 3460; AGO NS5624)

B-168 APPLICATION OF INMATE OF PUBLIC INSTITUTION

B-168

(See Sec. B-512)

B-170 THE APPLICATION FORM

B-170

A. Sworn Statement

The application, Form Bl 200, is the applicant's sworn statement that he believes himself to be eligible for the aid for which application is made. The form may be filled out in longhand or the county may insert the information as given by the applicant. In this latter instance, the form shall be read by or to the applicant before his signature under oath is affixed. The form may be filled out in triplicate, or one copy only may be made and two copies certified as true copies of the original. One copy of the application shall be given to the applicant at the time the form is signed.

Each statement on the application shall be completed. The words "no", "none" or "unknown" shall be used, when that is the correct answer.

(Section Continued on Next Page)

202-20 Restated

B-160

Restated

B-160 (Continued)

The following procedure is then applicable:

- 1. Immediately after action by the board of supervisors, the State hospital from which the applicant is to be given a leave of absence shall be notified. If aid is approved, the notification shall be accompanied by two copies of Form Bl 235, Certification From State Department of Mental Hygiene of Applicant's Release from State Hospital, to be completed by the SDMH.
- 2. Upon release of the patient on leave from the hospital one copy of the completed Form Bl 235 shall be returned to the county of residence.
- 3. On receipt of Form Bl 235 giving the date on which the applicant was released from the State hospital, the applicant's warrant is mailed to him if he has no guardian, or to the guardian, if a guardian of the estate, or of the person and estate has been appointed.

The aid is paid directly to the person on leave when:

- 1. No guardian has been appointed; or
- 2. The guardian is of the person only.

The aid is paid to the guardian when he is:

- 1. Guardian of the estate only; or
- 2. Guardian of the person and the estate.

(See Sec. B-155 Guardianship) (Prob. C 1460 et seq; AGO NS858, NS3293; (Walc 3075, 3460)

610-75 Restated

B-165 APPLICATION OF PAROLEE FROM PRISON

B-165

If a parolee from a state or federal prison lives in the county in which he had legal residence immediately prior to commitment to the institution and applies for aid in that county, the application shall be taken and the usual determination of eligibility completed.

B-170 (Continued)

B-170

If the applicant is unable to sign his name, a mark (or thumb print) may be used. In this case, two persons are required as witnesses. The form for the signature is as follows:

his John X

Jones

mark

Signature or Mark of Applicant

Witness to Mark

Witness to Mark

If the applicant is handicapped to the extent that he is unable to sign his name or to make his mark, it is acceptable for a witness to touch the pen to the body of the applicant prior to making the mark for him. Thus, by making the ritual a physical act rather than actually having the applicant himself make the mark, the objective of maintaining the comfort and the dignity of the individual can be approached. In this instance, the mark itself is made by one of the two witnesses.

The above instructions regarding form of signature, etc., apply to signatures on all forms which may be required. (See Sec. B-155 on Signature in Guardian-ships)

D. Acknowledgment

The applicant's signature on the application shall be acknowledged under cath by a properly qualified official. The date of such acknowledgment is the date of the application.

If a person administering the oath is a witness to the mark, his signature must appear twice, once as a witness to the mark and again in the certificate of acknowledgment.

If the oath of an affiant or the affidavit of a person is necessary in order that a person may obtain charity or relief from an agency or department of the U. S. Government, State of California, or any political subdivision thereof, no fee shall be charged for the taking of such oath. (Walc 3075, 3081, 3460, 3470; Gov. C. 6105)

B-175 COUNTY CARD FILES AND CONTROLS

B-175

The county shall maintain a permanent card file of all persons who have made a request for aid as defined in Sec. B-120. When a request has become an application, the state number assigned to the application shall appear on the card or there shall be available a cross reference thereto.

(Section Continued on Next Page)

B-170 (Continued)

B. County and State Numbers

The county number and the state number shall be entered on the application form at the time it is taken. There shall be no distinction in numbering between ANB and APSB cases.

1. Cases never before on ANB or APSB in county

List names in alphabetical order and assign numbers in sequence beginning with the number following the number assigned to the last case granted by the previous board action.

2. Cases previously on ANB or APSB in county

Reassign the former state number. Exception: Spouses who formerly received ANB and/or APSB under one number in the county.

- a. If both spouses return to ANB and/or APSB, reassign the former number to the husband and assign a new number to the wife.
- b. If one spouse returns to ANB or APSB, assign a new number unless the other spouse is deceased; in the latter instance reassign the former number

Whenever the term "State Number" is used, it refers to the combination of county prefix, numerical designation, and categorical suffix; e.g., Ala 10101 Bl.

The ANB-APSB number series shall be independent of the OAS series.

C. Signature

The applicant is to make his usual signature. A woman is to use her own given name. An applicant who usually prints his name may sign it in this manner. A signature in a foreign language is acceptable. A typewritten name or a rubber stamp imprint is not an acceptable signature.

B-175 (Continued)

B-175

Such other card files and controls as may be necessary shall be maintained in connection with:

1. Pending applications

- 2. Cases in which an application has been signed, but aid has been denied or discontinued, or in which the application has been cancelled or withdrawn
- 3. Active cases currently receiving aid
- 4. Annual redeterminations of eligibility

5. Transfers of cases to or from another county

6. Completion of required period of county residence on non-county cases

7. All requests for aid even though an application is not signed. (Walc 3075, 3460)

B-180 REPORTING ACTIONS OF BOARD OF SUPERVISORS TO SDSW

B-180

The SDSW shall be notified of the action of the board of supervisors on all applications, restorations, and requests for change from one form of aid to another, within 15 days after such action by submission of the properly completed forms set forth in the following chart:

Granted

Application	Bl 2	000	(original o	or	certified	copy)
Certificate of Eligibility	Bl 2	201	(original o	or	certified	copy)
Social Data Record Card	·B1 2	230	(original)			
Notice of Change	Bl 2	232				

250-05 Restated

Denied

Bl 200 (original or certified copy)
Bl 201 (original or certified copy)

Bl 239 (if request for change from one form of aid to another is denied)

If denial is rescinded and reported on Form Bl 232, a completed Form Bl 201 showing approval by the board of supervisors shall accompany the Bl 232. If aid is granted on an appeal to the SDSW following a denial, a completed Form Bl 201 shall be forwarded to the SDSW.

201-25 Restated

For detailed procedures with respect to county aid claims, reference should be made to the sections on Financial Procedures in the Manual of Policies and Procedures. (Walc 3077, 3085, 3089, 3460)

B-206 (Continued)

B-206

It should be recognized that to some individuals, the act of applying for public assistance is an experience which may be distressing not only because it implies dependency, but because it exposes certain aspects of his life to public inquiry. This inquiry may have to him the added implication that little trust, if any, is placed upon the statements which he has made and to which he has attested under oath.

Under the section quoted above, the sworn statement of the applicant is acceptable evidence of the facts stated on the Application, Form Bl 200, and Affirmation of Eligibility, Form Bl 206, except with regard to blindness and residence, and further determination is not required unless, because of a discrepancy or conflicting information, there is reason to believe that further determination is necessary on one or more points of eligibility in any given case.

The applicant has the responsibility, in so far as he is able, to give information to assist the county in establishing eligibility. However, the county is responsible for offering and rendering service to the applicant in securing the required evidence, and the burden of proof that he is eligible shall not be imposed upon the applicant. Overinvestigation of eligibility which is adequately established shall be avoided. When one point of ineligibility has been clearly established, the investigation of other eligibility factors may cease. (W&IC 3081, 3082, 3470)

B-208 SOURCES AND EVALUATION OF EVIDENCE

B-208

The applicant or recipient shall be the primary source of evidence except as to residence and degree of blindness. In those instances in which he is unable to give definite, clear, and complete information, he may have or be able to secure additional evidence to substantiate his statements. Such evidence shall be used whenever available.

There will be occasions when the individual will request the county or the county will offer, with his permission, to secure the additional evidence necessary for a determination, either from other individuals or organizations, or from public or private records. His written consent authorizing release of information from records other than those open to the public is required in most instances. He should understand the reason for such investigation.

Records of private and public social agencies, hospitals, clinics, schools, records of various county officers such as the recorder, assessor, etc., and the records of vital statistics department, etc., frequently contain information pertinent and necessary to establish eligibility.

(Section Continued on Next Page)

230-25 Restated

230-25 Restated

B-202 CONDUCT OF PERSONS ADMINISTERING AID

The public assistance worker administering aid shall conduct himself with courtesy, consideration and respect toward applicants and recipients. The worker shall endeavor at all times to perform his duties in such a manner as to secure for every blind person the maximum amount of aid to which he is entitled. He shall not attempt to elicit any unnecessary information or make any comment or criticism of any fact concerning an applicant or recipient which is not directly connected with aid to the blind. (Walc 3082.1, 3460)

B-204 OATHS

B-204

B-202

The director, or person by whatever title designated, who acts as a director of a county agency carrying out the provisions of the aid to the blind programs may authorize his representative or representatives to take such affidavits and administer such oaths as are required for these programs. (WAIC 7.5)

B-206 THE ELIGIBILITY DETERMINATION PROCESS

B-206

In a democracy, the rights of a citizen are defined by law. Similarly, democratic principles of equity require that eligibility for benefits in a publicly supported program be also defined by law. California State laws, therefore, specify the eligibility requirements. All persons meeting the eligibility qualifications are equal before the law, and have a right to receive aid under a uniform application of the law. A determination of eligibility is designed to establish whether (a) the person is eligible to receive the aid for which he is applying; (b) he is ineligible for such aid; (c) he is no longer eligible to receive aid; (d) he is eligible to continue to receive aid. Determination of eligibility is the process of obtaining the pertinent evidence, evaluating the adequacy and competency of such evidence, and arriving at a decision.

It was perhaps the respect for the feelings and dignity of the individual that prompted the Legislature to make this declaration in law:

"The applicant's sworn statements in his application shall constitute prima facie evidence of the facts stated, except with respect to degree of blindness and residence. This section shall not be interpreted to preclude a full and complete investigation by the agency administering aid to the blind."

B-212 SOCIAL SERVICE EXCHANGE

B-212

Clearance through a confidential index or social service exchange enables the county to determine the social agencies to which the applicant may have been known or is known. Case records of social agencies may contain facts or substantial information pertinent to the applicant's eligibility for aid. One agency's records may indicate other social agencies or organizations which have information concerning applicant. (Wall 3075, 3460)

B-214 VERIFICATION OF PLAN FOR SELF-SUPPORT APSB ONLY

B-214

The purpose of the APSB law is to provide a plan whereby blind persons may be encouraged to take advantage of and to enlarge their economic opportunities, to the end that they may render themselves independent of public assistance and become entirely self-supporting. It is recognized that resources and income beyound the necessities of bare subsistence are required to achieve this objective. The law encourages the blind in their efforts to become self-supporting by allowing the retention of necessary income (See Sec. B-542, Exempt Income in APSB) and resources (See Sec. B-442, Personal Property Eligibility Requirements) by those showing a reasonable probability of being able and willing to undertake the acquisition of resources and income necessary for self-support.

The following two criteria should be applied in determining eligibility of an applicant or recipient:

- 1. A reasonably adequate plan which may lead to self-support.
- 2. A sincere and sustained effort to further that plan.

The amount of money earned by an individual is only one factor in determining adequacy of the plan if the foregoing qualifications are met. The county shall discuss with him his plan for achieving self-support. The plan should be evaluated with his participation, giving consideration to his ability or aptitude for the chosen plan and its economic possibilities for future self-support. In making the final determination the county should give full weight to the individual's estimate of the possible success of the plan.

The county shall, with the consent of the individual, determine whether a sincere and sustained effort to further his plan has been demonstrated. The determination will vary with the types of plans. For example, if the individual is employed, the number of hours worked and the wage received shall be determined. If he is in business for himself or is practicing a profession, the county may make a periodic examination of the books and also determine the number of hours spent at the trade or profession. If he is in a trade school or university, the county may ascertain his course of study and the time spent in preparation. In some instances the record of his achievement is pertinent.

B-208 (Continued)

B-208

If the individual has previously received aid from another county in the state, evidence of eligibility may be secured from the county previously assisting. The new county shall be responsible for redetermining the eligibility of the individual for those factors which were subject to change.

Eligibility determination should be directed toward the accumulation of factual information. The worker who keeps in mind that the information is for the benefit of the applicant or recipient as well as the county will be less likely to mistake opinions or rumors for facts.

If there is conflict between the individual's sworn statement and other evidence, decision shall rest upon the established facts. A conflict in information from two apprently equally reliable sources usually means that not all facts have been discovered and further inquiry is indicated until reasonable doubt is resolved.

Evaluation of the source of information is essential. In making such an evaluation, the following questions may be considered: What is the source of the reference's information? Is it based on first-hand observation or hearsay? What is the bias or self-interest of the person? Would his motives affect his reliability as a reference. (Waic 3075, 3081, 3460, 3470)

B-210 AUTHORIZATION AND CONSENT FOR INVESTIGATION

B-210

If the applicant's sworn statement regarding financial resources cannot be accepted because of a discrepancy or conflicting information, and it is necessary to obtain verification, the applicant and spouse, if applicant is married and not living apart from such spouse, shall sign an Authorization for Financial Investigation (Form AB 228) and other forms required in verifying necessary information. Special forms may be devised by the county to cover specific types of inquiries.

If a bank account, insurance policy, etc., is carried in a name not used in the application and/or other supporting papers, both names shall be used in consent forms. A clear statement of reason for variation in name, and, if necessary, an affidavit establishing identity, shall be secured.

Full identifying data should be given in order that the organization of which inquiry is made may be able to locate records pertaining to the applicant without necessity for further correspondence.

Some agencies which require written authorization for release of information are: (1) federal agencies, such as the U. S. Census Bureau, U. S. Post Office (concerning postal savings), Veterans' Facility, Adjutant-General's Office, RRB and the OASI Bureau; (2) insurance companies, and firms dealing with private financial matters, including stock brokers; (3) employers; (4) hospitals, physicians, clinics, and medical agencies. If a form is prescribed by an agency; e.g., OASI Bureau, all the data called for should be given. (WaIC 3075, 3081, 3460, 3470)

B-218 CASE RECORDS B-218

A. Purpose of Case Records

The case record is the foundation of a public welfare program. The information contained in it, reflecting an adequate and proper determination of eligibility factors, serves to protect the public as well as the individual applicant or recipient. It protects the public interest by containing verification that public funds are being properly expended or that they were properly denied to an applicant deemed ineligible for such funds on the basis of available facts. The case record serves as an assurance to the individual that a determination was made in an impartial and proper manner, and that any aid authorized on his behalf was paid according to law.

It is, therefore, essential that case records shall be maintained which shall contain factual evidence that is adequate and competent to support the recommendation that aid be granted or denied. If there are pertinent conflictein information relating to eligibility or ineligibility, the case record shall show how these were reconciled.

B. Document Contents

In general, the case record shall contain the face sheet, when used, the $\ref{eq:cond}$ narrative record, the Report of Investigation (Form Bl 202) or a substitute $\ref{eq:combination}$ combination of the face sheet (DPA $\ref{eq:combination}$) and the narrative.

It shall also include, in a uniform arrangement, copies of all forms completed in connection with an application and investigation, including the forms required for submission to the SDSW, as well as those devised by the county, and copies of all correspondence. The application (Form Bl 200) and Certificate of Verification of Eligibility (Form Bl 201) shall be either original or certified copies or duplicate copies. An original signature is necessary on the Form Bl 200.

The case record shall contain verification that a copy of the Notification of Action by the Board of Supervisors (Form Bl 239) was mailed to the applicant or recipient. If a copy of the Form Bl 239 (or a carbon copy of the information included on the Form Bl 239) is not filed in the case record, the date the Form Bl 239 is mailed to the applicant or recipient shall be recorded either: (1) in the case history, or (2) on the copy of Form Bl 201 which is retained in the case record, or (3) on the copy of the Notice of Change (Form Bl 232) which is retained in the case record.

B-214 (Continued)

B-214

Experience has shown that even though an original plan may have been subject to some question, the encouragement given the blind person often leads him to an even more satisfactory goal than originally appeared possible.

A recipient can change his plan for self-support at any time; therefore, when his effort seems to be ineffectual or the plan appears inadequate, the worker can render a genuine service by re-exploring the entire situation with the recipient. Where the amount of earnings inherent in the plan appears unlikely to be developed eventually to the level of self-support, such a plan would be open to question as to its adequacy.

The county shall give any service possible to the individual in furthering his plan for self-support. This includes making available to him any community or statewide resources for training or placement service. It has been found that many frequently encountered plans for self-support pursued by blind persons come within the following general categories:

1. Regular employment in state industrial workshops;

2. Vocational training under the Bureau of Vocational Rehabilitation of the State Department of Education;

Regular attendance at any institution of higher learning in the state;

4. Regular attendance at a recognized professional school or trade school;

5. Operation of vending stands;

6. Self-employment in own established business, farm, dairy, etc;

7. Regular practice of a profession, such as law, osteopathy, chiropractic, coaching, private teaching of music, etc;

Regular employment for wages or salary;

9. Regular practice of piano tuning, broom making, or other trades. (Well 3400, 3401, 3451, 3460)

B-216 HOME VISITS DURING DETERMINATION AND REDETERMINATION OF ELIGIBILITY

B-216

If possible, a home visit shall be made during the determination of eligibility following receipt of the application. If a home visit cannot be made, an interview shall be held elsewhere with the applicant. The case record shall set forth conditions which made a home visit impossible. If an applicant is bedridden, a home visit is necessary.

A home visit shall be made or an interview held elsewhere at the time of, or within three months prior to, the annual redetermination of eligibility. (W&IC 3075, 3460)

B-220 (Continued)

B-220

If aid is changed from one category to another every possible effort should be made to the end that, whenever possible, no interruption in the receipt of aid occurs; neither shall there be overlapping of the date of discontinuing one aid and the date of beginning the other aid.

A recipient of APSB shall be transferred to ANB if the county is not satisfied that he has an adequate plan for self-support or is not making a sufficiently sincere and sustained effort toward self-support. Similarly, an ANB recipient shall be transferred to APSB if he meets the eligibility requirements therefor, and provided he requests the transfer either orally or in writing. The request for transfer shall be recorded in the county file. It is not necessary for the county to complete a new application or Certificate of Eligibility when a transfer from one chapter of aid to the blind to the other is effected. Notice of Change is used for this purpose.

The recipient need only be required to furnish information concerning those items which will require additional verification to determine his eligibility for the aid requested.

If a determination is due at the time of the transfer from ANB to APSB, or vice versa, full information shall be secured and the Recipient's Affirmation of Eligibility (Form Bl 206) shall be completed by the recipient. (See Sec. B-624, Beginning Date of Aid) (Wall 3045, 3075, 3083.3, 3083.5, 3445, 3460, 3471.5, 3473)

B-222 WHEN AID SHALL BE DENIED

B-222

The application shall be denied if any of the following conditions exist:

- 1. Ineligibility on any requirement is established.
- 2. Diligent consideration of all reasonable sources of evidence of eligibility fails to establish eligibility.
- 3. The applicant's whereabouts are unknown and he cannot be located.
- The applicant has established residence in another state before the determination of eligibility is completed.

 (WAIC 3075, 3083, 3084, 3085, 3460, 3471, 3472)

B-218 (Continued)

C. Recorded Contents

All information pertinent to eligibility should be recorded. Irrelevant material should be excluded. The needs of the individual, and the services rendered to meet those needs by the county or another agency, should be noted in the case record. In the initial interview, information obtained regarding the individual's changed circumstances which prompted the application for aid, his attitudes, plans, etc., relating to rehabilitation, employment, and adjustment, is most helpful in later evaluation of his needs and determination as to how they can be met. This information should also be recorded, when applicable, at time of the redetermination.

The content of documents in the applicant's possession or in public records which were examined by the worker shall be recorded. Such recording shall fully identify the document and clearly state the facts therein which were extracted as evidence. It is unnecessary to have copies of such documents in the record.

D. Contents Considered Permanent

Forms Bl 200, Bl 201, Bl 206, and Bl 232, together with any documents supporting determination of eligibility, and accounting records constitute permanent records. One copy each of such forms, documents, and records shall be preserved irrespective of the length of time aid may have been discontinued.

If aid has been discontinued for five years or more, the narrative record may be destroyed, upon authorization of the board of supervisors, if its content has been photographed in such manner that it may be reproduced. (Walc 3075, 3091.5, 3460)

B-220 CHANGE FROM ONE FORM OF AID TO ANOTHER

B-220

An applicant for or recipient of OAS may apply for ANB or APSB or vice versa, and if eligible aid shall be granted. Aid shall not be received under the ANB or APSB law while aid under the OAS law is being received and vice versa; i.e., aid shall be discontinued in OAS as of the day preceding the date on which ANB or APSB begins or vice versa.

A person who is receiving APSB may not change to ANB until one full year from the date on which his application was filed. A person receiving ANB may change to APSB at any time.

B-224 FACSIMILE SIGNATURES

B-224

Documents on which facsimile signatures are acceptable are:

Certificate of Verification of Eligibility (Bl 201) signed by county worker and by case supervisor or county director; also signed by county clerk or deputy county clerk.

Notice of Change (B1 232) signed by county clerk or deputy county clerk.

Social Data Record Card (Bl 230) signed by "person completing form."

Notification of Transfer (AB 215) signed by county worker.

It is necessary that the facsimile signatures be affixed either by or under the special authority of the county officer whose signature is thus affixed. (Ward 3075, 3460)

B-226 CERTIFICATE AND AFFIRMATION OF ELIGIBILITY

B-226

A. Certificate of Eligibility

The Certificate of Eligibility (Form Bl 201) is the report of the county to the SDSW certifying that eligibility or ineligibility has been established; that complete supporting evidence is on file in the county office; and on which action of the board of supervisors completing the eligibility determination is shown. It briefly reports the facts establishing eligibility, ineligibility, the nature of the evidence, the place where original evidence may be reviewed, and the action of the board of supervisors. This form provides a basis for payment of the county's claim for reimbursement.

Upon completion of the eligibility determination, the last step of which is action by the board of supervisors, the county shall submit either the original or a certified copy of Form Bl 201 to the SDSW.

An original or certified copy of the form shall be retained in the county case record.

B. Affirmation of Eligibility

The results of the redetermination shall be recorded on the reverse of Recipient's Affirmation of Eligibility, Form Bl 206, unless an alternate form approved by SDSW is used or the material is recorded elsewhere in the case record. Regardless of where the results of the redetermination are recorded, Item 10 on the reverse of Form Bl 206 shall be completed for every case. (See Sec. B-234, Determination of Continuing Eligibility)

B-230 BOARD OF SUPERVISORS ACTION

B-230

Upon receipt of an application, the county shall make a determination of eligibility or ineligibility. On the basis of this determination, a recommendation shall be made to the board of supervisors that aid be granted or denied. If the recommendation is that aid shall be granted, the amount of aid and the beginning date of payment shall be indicated.

The board of supervisors shall grant or deny the application at the first meeting for consideration of such applications subsequent to receipt of the recommendation made to them by its designated representatives.

On the basis of its determination, the county shall recommend to the board of supervisors any indicated change in the aid payment, including restoration, increase, decrease, cancellation of warrants under suspension procedure, transfer from one form of aid to another, and discontinuance. If it is recommended that aid be restored, increased, or decreased, the recommendation shall include the amount of the aid as well as the effective date. All recommendations for other changes shall include the effective date.

Action of the board of supervisors granting, restoring, transferring from one form of aid to another, increasing or decreasing aid, constitutes the final action which unconditionally authorizes payment to be delivered to the specified payee. Such action authorizes delivery of the payment immediately, except where a future date is specified. With respect to continuing grants, the first day of each month (as provided by law) is the effective date of the continuing authorization for payment.

Likewise, when aid is granted pursuant to an order of the SSWB (after a hearing on appeal), the action of the board of supervisors by which the SSWB's order is executed constitutes the final action which unconditionally authorizes payment to be delivered to the appellant. The SSWB, when ordering aid paid on an appeal, in effect remands the case to the board of supervisors which alone has the power to direct disbursement of funds from the county treasury.

The authorization is mandatory with respect to its execution, except where payment of aid is withheld or suspended because of a cloud on eligibility.

If aid is denied erroneously, the board of supervisors shall formally rescind its previous denial and the SDSW shall be notified of this action. The Notice of Change, Form Bl 232, may be used to report the rescinding action.

(WAIC 3026, 3082, 3083, 3084, 3421, 3472)

610-30 Restated

610-30 Restated

B-226 (Continued)

B-226

C. Recording on Forms

If the county accepts the statement of the applicant or recipient as evidence of eligibility without further investigation, the following statement shall be recorded opposite the various items on Form Bl 20l for new cases and on the reverse of the Form Bl 206, or elsewhere in the case record for reinvestigated cases: "Applicant's sworn statement on Form Bl 200 (or Bl 206)." If on any point of eligibility it is deemed necessary to secure verification other than the sworn statement of the applicant or recipient, the entry on the Form Bl 20l or the reverse side of the Form Bl 206, or elsewhere in the case record for redeterminations, shall show the method such verification was secured.

No separate document concerning degree of blindness will accompany the Application, Form Bl 200, and Certificate of Eligibility, Form Bl 201. Instead, there shall be recording on the Form Bl 201 opposite "Blindness" as follows: "Form Bl 263, dated , shows eligible (or ineligible) on basis of eye examination by Dr. James Roe (date)." (Walc 3075, 3081, 3085, 3089, 3460, 3470)

B-228 SOCIAL DATA RECORD CARDS

B-228

Social Data Record Card (Form Bl 230) shall accompany each approved application (Form Bl 200) submitted to SDSW. Form Bl 230 shall accompany each application for an APSB case even though case has been continuously on aid under the ANB program.

The data collected on Form Bl 230 provides:

- 1. Source data from which estimates on proposed legislation can be prepared for the State Legislature.
- 2. Information against which SDSW may check results of departmental rulings, legislation, and economic changes.
- 3. Information for release by SDSW for use of county welfare administrators and other public officials. (WAIC 115, 116)

DB 40

Effective June 1, 1951

B-234 DETERMINATION OF CONTINUING ELIGIBILITY

B-234

A. Purpose of Redetermination

The determination of eligibility is a continuing responsibility. Such determination involves not only the immediate objective of reviewing continuing eligibility, but the broader and more fundamental objective of assisting the recipient to make maximum use of his own resources and capacities.

B. Frequency of Redetermination

There shall be a redetermination of eligibility at intervals not exceeding twelve months. Whenever an interview with the recipient is held, any possible changes in the person's circumstances should be covered in order to determine the adjustments, if any, to be made in the amount of aid, and the services which can be rendered to him.

At least annually, the county shall review the case of every person receiving aid under either ANB or APSB and shall redetermine under which program he is eligible to receive aid for the ensuing year. (Walc 3083.5, 3089, 3473)

If personal property is of fluctuating value and approaches the maximum permitted, its value shall be redetermined at least every three months.

Upon receipt of a report of an alleged resource or other unverified information which raises question regarding a recipient's continued eligibility, appropriate investigation shall be initiated promptly. A sustained effort shall be made to complete the investigation within the first month following that in which the report causing the investigation is received.

The decision as to frequency of redetermination should be based upon a consideration of all pertinent factors in each case. Certain factor cipient's situation which become evident during the initial determine indicate when the recipient's eligibility should again be reviewed. consideration of all pertinent factors in each case. Certain factors in a recipient's situation which become evident during the initial determination may

The county's responsibility for making redetermination should be interpreted to the recipient. The latter's responsibility for notifying the county of changes in address, or financial situation, including changes in income, should be fully discussed with him.

250-10 361-80 Restate

B-232

B-232 NOTIFICATION TO APPLICANT OR RECIPIENT REGARDING APPLICATION OR AMOUNT OF AID

The applicant or recipient shall be notified in writing immediately following the action taken by the board of supervisors regarding:

- 1. Disposition of the application.
- 2. Change in amount of aid.
- 3. Discontinuance of aid.
- 4. Withholding delivery of warrant for any month beyond the usual delivery date for aid payments.
- 5. Change in one form of aid to another, or denial of a request for change.

Notification of Action by the Board of Supervisors, Form Bl 239 and Notification of Suspended (Withheld) Aid Payments, Form Bl 239-A, include the minimum requirements for such notification, and shall be used by the county unless substitute forms which incorporate the information appearing on these forms are used. Form Bl 239 or a substitute form shall include the following:

- 1. The nature of the board of supervisors action, i.e., granting or denial of aid on applications or restorations. If granted, the amount of aid shall be shown.
- 2. The date from which the board of supervisors action is effective.
- 3. The date the form is forwarded to the applicant.
- 4. A statement regarding the right of appeal for a fair hearing, including the address of the SDSW. The applicant shall also be notified of his right to a hearing before the board of supervisors upon application for such hearing within 30 days from the date of notification of the board of supervisors' action.
- 5. A suggestion that the applicant discuss with the county any dissatisfaction regarding the board of supervisors' action.
- 6. The source and amount of income and amount of deductions shall be listed if aid is granted in less than the maximum amount.
- 7. In ANB, the amount of total need shall be shown, if the total verified need of the individual is determined to be in excess of the statutory maximum.

If a recipient requests it, he shall be provided with a statement of the particular items of special need allowed, the amount allowed for each item, and the total need. Such statement shall be provided him within 10 days after the request is made. (WAIC 3075, 3086, 3087.5, 3089, 3460, 3473, 3473.2)

It is customary to begin work on individual cases in advance of the particular month in which the determination is due to be completed. This may result in the redetermination for some cases being completed in advance of the anniversary month. If a redetermination is due to be completed in advance of the anniversary month, but is completed within the two months immediately preceding that month, no adjustment of the due date for the next redetermination is necessary.

Example: The worker is notified in April that the redetermination is due to be completed in July. Redetermination of eligibility is begun immediately and in May the redetermination is completed within the two months preceding the anniversary month, the due date for the next redetermination remains the same, i.e., July.

If in the same example the redetermination was completed in April, the next annual redetermination will be due to be completed not later than the following April.

A redetermination date once set may be changed provided the adjusted date results in the new due date being set not later than twelve months from the original investigation or last redetermination. When two or more persons in the family group are receiving aid, it may be desirable to make the redetermination for each such recipient at the same time. Under these circumstances the redetermination for each recipient living in the same household is made in the month in which the earliest redetermination falls due. The next redetermination for each would be due not later than twelve months from such redetermination. Similarly it may be of advantage to adjust the redetermination date for persons living in a particular vicinity so that redeterminations will fall due in the same month.

The date redetermination was completed is defined as the month in which the county worker and/or the case supervisor or county welfare director (dependent upon county discretion in determining when the redetermination is "completed") signed the reverse of the completed Form Bl 206.

E. Notification to SDSW of Completion of Redetermination

A statistical report on redeterminations completed shall be submitted each month by the county on Form DPA 10, Monthly Statistical Report on Public Assistance Reinvestigations. (See sections on Statistical Procedures in the Manual of Policies and Procedures for references regarding monthly statistical reports.) (Walc 3050, 3075, 3083.1, 3083.5, 3089, 3460, 3462.1)

352-25

B-234 (Continued)

affidavit form.

B-234

C. Scope and Requirements of Redetermination

Each recipient shall be requested to sign an Affirmation of Eligibility (Form Bl 206) once each year at the time of annual redetermination of eligibility. Form Bl 206 shall also be obtained if restoration follows a discontinuance which extends beyond the due date for annual redetermination of eligibility. The redetermination shall include all points of eligibility which may have changed during the preceding year. Certain points of eligibility once established ordinarily require no further investigation. Form Bl 206 contains the minimum information which shall be secured annually from the recipient. The recipient shall sign the Form Bl 206 before a notary or other person authorized to attest his signature. The completion of this form is the logical starting point of the redetermination process. The county may substitute its own forms provided the substitute form contains all the information called for on Form Bl 206 and is in

Each space on the form should be filled in with the appropriate information or the words "none" or "not known". The type of real or personal property which has been disposed of or acquired should be noted in the space provided, such as house and lot, automobile, stocks, etc.

The county shall give all assistance necessary in the completion of this form. The completed form shall be kept in the county case record. (See Sec. B-226, Certificate and Affirmation of Eligibility)

The degree of blindness of the recipient shall be redetermined annually unless the SDSW has advised a reexamination is not necessary. (See Sec. B-255, Redetermination of Degree of Blindness)

The ability of relatives to contribute shall be redetermined annually. (Sec. B-582, Determination of Pecuniary Ability of Responsible Relatives)

The case history shall contain a record of the individual's efforts to achieve self-support, and his progress in this direction. If a recipient finds it necessary to change his plan for self-support, the case record should contain information regarding the factors upon which his decision was based. (See Sec. B-214, Verification of Plan for Self-support)

D. Due Date of Annual Redetermination

The date for completion of redetermination of eligibility may be set according to any plan which guarantees such determination once annually. This date may be set on the basis of the beginning date of aid, the date of the last redetermination, or any other arbitrary date may be set provided such date does not establish the due date for the completion of the next redetermination beyond twelve months from the month in which aid began or from the month in which the last redetermination was completed.

(Section Continued on Next Page)

361-20 351-10 Restated

Restated, eliminating option on notarization due to provision on sworm statement as prima facie evidence.

351-50

B-236 REDETERMINATION DURING ABSENCE FROM THE STATE OR COUNTY

If redetermination of eligibility falls due during temporary absence from the state or county, the assistance of the welfare agency in the locality in which the recipient is living shall be requested in completing the redetermination. An Affirmation of Eligibility, Form Bl 206, shall be sent to the agency with the request that it interview the recipient, secure the signed Form Bl 206, and return it together with a report of the recipient's statement of his plan regarding residence, his living arrangements, the source and amount of his income, etc. Sufficient information about the recipient and the nature of the information desired regarding him should be given in the letter of inquiry, so that the agency may proceed in collecting and transmitting the necessary information. (See Sec. B-376, Absence from State--Continuance of Aid and Required Reports)

If the signed Form Bl 206 and the report are not returned by the agency within a reasonable time after follow-up is made, direct request should be made to the recipient to complete the Form Bl 206 and to forward it together with his statement of his intent with respect to residence and his living arrangements.

The SDSW will assist in arranging for an acceptable eye examination upon written request from the county. (W&IC 3075, 3089, 3460, 3473)

B-238 REDETERMINATION DURING INTER-COUNTY TRANSFER

B-238

If the due date of redetermination falls within the three months immediately preceding the effective date of transfer of aid from one county to another, the county currently paying aid need not make the redetermination as the second county will be making a determination before it grants aid.

If an annual reexamination of the eyes is required in connection with the redetermination, which would have been made had the person not moved to another county, the payment for such examination shall be made by the county currently paying aid. (See Sec. B-255, Redetermination of Degree of Blindness) (Walc 3075, 3460)

B-246 (Continued)

B-246

(In general, an individual meeting the definition of blindness with a visual acuity of 20/200 in the better eye may be considered to have 1/10th of "normal vision" in that eye; a person with a visual acuity of 10/300 vision may be considered to have 1/30th of "normal vision." A person with a visual acuity of 20/100, which is better vision than 20/200, may be considered to have 1/5th of "normal vision.")

(In general, a person whose field of vision is so impaired as to come within the definition of blindness, or restricted to 20 degrees, may be described as being able to see an object as though he were looking through a gun barrel. This is frequently called "gun barrel vision.")

(W&IC 3005, 3050, 3075, 3403, 3460)

B-249 DETERMINATION OF DEGREE OF BLINDNESS

B-249

An eye examination by a duly licensed and practicing physician, skilled in diseases of the eye, is required by law to establish eligibility and continuance of eligibility. (See Sec. B-264, Neuropsychiatric Examinations)

A. Examinations by Authorized Physicians

All examinations to establish degree of blindness must be made by the physicians authorized by the SDSW. Unless specific authorization is obtained from the SDSW, eye examinations shall be made only by a physician whose name appears in Sec. B-282, List of Authorized Physicians for Eye Examinations. If there are no physicians on the list practicing in the county in which the individual lives, the nearest authorized examiner shall be used. When more than one physician is available, the individual shall have a choice of the physician who is to make the eye examination.

B. Reports in Writing and from Clinics

Reports of the eye examinations shall be completed in writing over the signature of the physician who made the examination. The form of the report, Physician's Report of Eye Examination, Form Bl 227, is prescribed by the SDSW. Reports of examinations from clinics cannot be accepted unless the physician who made the examination and signed the report is one on the list of authorized examiners.

C. Out of State Examinations

Out of state physicians who have been authorized by the SDSW to make eye examinations appear at the end of the list, and individuals may be referred to them for eye examinations when they are the nearest examiners available. The names and addresses of physicians not on the list who can be authorized to make examinations for persons visiting out of state may be obtained by writing to the SDSW. The individual's out-of-state address must be included in the letter. (WRIC 3075, 3083, 3460, 3471)

B-243 BLINDNESS -- ELIGIBILITY REQUIREMENT

To be eligible for **&**id to the **b**lind a person's visual impairment must come within the definition of economic blindness as defined and determined in Sections B-246 and B-249.

(W&IC 3005, 3050, 3075, 3403, 3460)

B-246 DEFINITION OF BLINDNESS

B-246

B-243

The definition of economic blindness as used to determine eligibility follows:

- 1. In general, central visual acuity of 20/200 or less in the better eye, with the aid of the best possible correcting glass, shall be considered blindness.
- 2. Central visual acuity better than 20/200 shall be considered as blindness only when the peripheral field has contracted to such an extent that the widest diameter of the remaining visual field is not greater than 20 degrees. The maximum diameter of the field is taken into consideration and not the radius.
- 3. In cases where central visual acuity is better than 20/200 and remaining peripheral fields exceed 20 degrees, but are so placed, or shaped, as to be of little practical use, or in an operated eye when the State Ophthalmologist feels that the disability inherent in the eye condition present indicates greater disability than the usual 20/200, the State Ophthalmologist shall use his discretion in recommending approval for aid if the report of pathology is of such character as to prevent applicant from providing himself with the necessities of life.

An individual with a central visual acuity of 20/200 can identify a standard object (the Snellen Test Character) at a distance of twenty feet, while an individual with normal vision can identify the same object at a distance of 200 feet. This statement relates to distance vision.

Central visual acuity is indicated by a fraction; the numerator indicates the distance of vision as measured by feet, and the denominator indicates the size of the letter which can be seen on the Snellen Testing chart. For example, 6/200 central visual acuity indicates the applicant can read a "200 foot" letter on the chart at a distance of six feet.

The applicant must have 20/200 or less, such as 3/200, 15/200, 10/300, or 15/400, to be eligible for aid on the basis of central visual acuity.

B-255 (Continued)

B-255

the illness or other condition. Permission must be obtained from the SDSW before such delay is authorized.

If a physician states that an individual has had both eyes removed (bilateral enucleation), the county shall so notify the SDSW, and no further examination is required.

If one or more of the following conditions exist, a re-examination of the eyes is required, even though the SDSW had previously notified the county that a re-examination was not necessary:

- 1. The recipient has had an eye operation. The eye examination following eye surgery shall be made within not less than 90 days or more than 120 days from the date of the surgery, unless permission for delay is obtained from the SDSW. (When surgery is performed under the Prevention of Blindness Program, the SDSW will assume responsibility for obtaining a post-operative report of eye examination and forwarding the findings to the county.)
- 2. There are facts to indicate that the recipient's vision has improved or is better than shown by the eye examination report.
- 3. There are facts to indicate the recipient is malingering so far as vision is concerned.
- 4. Aid has been discontinued for one year or more.

In any of these instances the county may write to the SDSW outlining the situation and requesting a decision regarding the necessity for a current eye examination. (WaIC 3075, 3083, 3460, 3471)

B-258 PROCEDURE WHEN APPLICANT QUESTIONS DECISION ON DEGREE OF BLINDNESS

B-258

If an applicant is dissatisfied with the physician's report of eye examination, he may submit a report of another examination made at his own expense by another physician on the authorized list of examiners. If the report of the second examination indicates that the applicant comes within the definition of blindness, a third examination by a physician designated by the SDSW shall be authorized at county expense. This physician will be provided with copies of the two conflicting reports, with the exception of the names of the physicians. Eligibility as to degree of blindness shall be determined on the basis of the two reports which agree.

(Section Continued on Next Page)

180-25 lestated

B-252 SDSW REVIEW OF EXAMINATION REPORTS

All reports of eye examinations and of neuropsychiatric examinations shall be acted upon by the SDSW. (See Sec. B-264, Neuropsychiatric Examinations.) This provision for the review of reports is to assist the county in determination of eligibility on degree of blindness. The review avoids payment to persons whose eye and/or neuropsychiatric examinations indicate that their degree of visual impairment does not come within the definition of blindness.

A. Submission of Reports to SDSW

When the examining physician returns the completed Physician's Report of Eye Examination, Form Bl 227, the county shall immediately submit it to SDSW, Division for the Blind, 145 South Spring St., Los Angeles 12, for review by the State Ophthalmologist.

B. Notification to County of Results of Review

After the SDSW review, the county will be notified immediately on Form Bl 263, Notice of Findings and Action on Physician's Report of Eye Examination, as to the eligibility status on degree of blindness and the need for future examinations. Form Bl 263 will be sufficient evidence of degree of blindness on which to take action according to the findings indicated thereon. Form Bl 263 shall be filed in the case record.

Form Bl 227 will be retained by the SDSW until a photostatic copy has been made, after which it will be returned to the county for filing in the case record. (W&IC 3075, 3460)

B-255 REDETERMINATION OF DEGREE OF BLINDNESS

B-255

The required annual redetermination of a recipient's eligibility for continuance of aid includes a re-examination of the eyes, unless the SDSW had previously indicated on Form Bl 263 that such re-examination is not necessary. (See Sec. B-252, SDSW Review of Examination Reports.) The examination shall be made by a physician on the authorized list who had not previously examined the recipient, when there is more than one examiner on such list within a reasonable distance. The report of the examination shall be immediately submitted to SDSW for review and findings as to eligibility on the basis of degree of blindness, in accord with Sec. B-252.

If a re-examination is indicated for a person who is bedfast, such re-examination is required even though it may be necessary to delay it because of

(Section Continued on Next Page)

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B-259 (Continued)

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- 3. If the Physician's Report from another physician is considered by the SDSW to be in conflict with the one which raised a question regarding continued eligibility, the withheld warrant shall be released, provided it is delivered before the end of the month for which it is drawn. An examination by a third physician shall be authorized in order that a decision may be made on the basis of the two reports which agree. The SDSW shall have the right to designate the physician who is to make the examination to resolve the conflict.
- 4. If a Physician's Report is submitted by a recipient prior to the end of the month for which the warrant is being held and the findings of the physician are in agreement with those which raised question with regard to continued eligibility, the withheld warrant shall be canceled. Aid shall be discontinued as of the last day of the month. preceding that for which the warrant is canceled.
- 5. Upon the release of the warrant which was withheld because eligibility was questioned, the warrant for the next or second month shall be issued and its delivery withheld, but not beyond the end of the month for which it is drawn.
- 6. If the physician's report of the third eye examination establishes eligibility, the withheld warrant shall be delivered to the recipient before the end of the month for which it is drawn and aid shall be continued in the amount to which the recipient is eligible.
- 7. If the physician's report of the third eye examination establishes ineligibility, or if eligibility is not determined by the end of the second month for which delivery of the warrant was withheld, the warrant shall be canceled and aid discontinued, effective with the last day of the month preceding that for which the warrant was canceled. (Walc 3083.1 and 3462.1)

Under no circumstances shall warrants for more than two months be issued and withheld pending clearance of eligibility.

If the recipient is dissatisfied with the report of a physician, he may submit a report of another examination made at his own expense by another physician on the authorized list.

The State Ophthalmologist shall have the privilege of examining the recipient and recommending final action on the basis of all available information. (Walc 3075, 3083, 3460, 3471)

B-261 APPEALS ON DEGREE OF BLINDNESS

B-261

An individual who is dissatisfied with the physician's report as to degree of blindness, has the right to appeal for a fair hearing. On appeals

B-258 (Continued)

The State Ophthalmologist shall have the privilege of examining the applicant and recommending final action on the basis of all available information. (See Sec. B-261, Appeals on Degree of Blindness.)

B-259 PROCEDURE WHEN ELIGIBILITY ON DEGREE OF BLINDNESS IS QUESTIONED

B-259

If the SDSW review of a current Physician's Report of an Eye Examination, Form Bl 227, raises a question regarding the eligibility of a recipient, the county will be notified on Form Bl 263, Notice of Findings and Action on Physician's Report of Eye Examination. Additional reports will be required and the county shall follow this procedure regarding continuance of aid, pending final determination as to eligibility on the basis of degree of blindness:

Withholding and/or Discontinuance of Aid

1. Upon receipt of Form Bl 263, the warrant for the coming month shall be issued in the usual manner, but delivery withheld, though not beyond the month for which it is drawn.

The recipient shall be notified immediately that continued eligibility is questioned, and arrangements shall be made as soon as possible for another examination by one of the authorized examiners, if he desires to have the additional examination.

If the recipient appears to be eligible for another form of aid, an application for such aid should be taken as soon as possible following the withholding of the warrant. This is designed to avoid possible loss of aid to the individual if his eligibility on the degree of blindness is not established.

2. The submission of Form Bl 227 from another physician may be dependent upon factors such as health condition of the recipient, proximity to a qualified examiner, etc. If such conditions exist and a Form Bl 227 is not submitted prior to the end of the month for which the warrant is being held, the withheld warrant shall be released, provided it is delivered before the end of the month for which it is drawn. A second and final notice shall be sent to the recipient with the released warrant advising that further payment will not be made unless eligibility is immediately cleared.

(Section Continued on Next Page)

361-40 Restated B-264 (Continued)

B-264

In these instances, the neuropsychiatric report must show involvement of the visual tracts or a psychiatric condition which results in little or no available vision for the individual.

If a neuropsychiatric examination is necessary, the SDSW will notify the county and request that the right of the individual to such an examination be discussed with him. It is the responsibility of the county to advise the SDSW of the individual's decision. If the individual wishes the examination, the county will make the appointment with the neuropsychiatrist, and the SDSW will send the necessary instructions to him. (Walc 3075, 3083, 3460, 3471)

B-267 MENTAL INCOMPETENTS

B-267

Aid shall not be granted if the eye and/or neuropsychiatric examination report indicates that the individual is so mentally incompetent that he cannot cooperate with the physician who makes the examination, or when sufficient eye, neurological, or psychiatric pathology is not found to account for the loss of vision claimed. If the examining physician reports sufficient pathology to account for the blindness, an estimate of visual acuity by the examiner may be accepted, if the mental condition of the individual prevents cooperation with the examining physician. (Walc 3075, 3083, 3460, 3471)

B-270 MALINGERING

B-270

Aid shall not be granted on the basis of an eye and/or neuropsychiatric report in which the examining physician states in effect that he believes the patient is malingering. (WAIC 3075, 3083, 3460, 3471)

B-273 PROOF THAT BLINDNESS OCCURRED WHILE CALIFORNIA RESIDENT

B - 273

If an applicant does not meet residence requirements set forth in Sec. B-313, Item 1, for a person who became blind while not a resident of California, but claims eligibility in accordance with that Section, as a person who became blind while a resident of California, he must establish that he became blind while a resident of the State.

B-261 (Continued)

based on degree of blindness, arrangements shall be made for another eye examination at county expense by a physician on the authorized list who had previously not examined the individual. If the report of this examination indicates that the individual does come within the definition of blindness, a third examination shall be authorized by a physician designated by the SDSW, and this physician will be provided with copies of the two conflicting reports, with the exception of the names of the physicians, since this examiner is acting in the capacity of a referee. Eligibility as to degree of blindness shall be determined on the basis of the two reports which agree.

180-25 Restated

If the State Ophthalmologist finds upon review that two of the physicians' reports of eye examination indicate that the person's visual impairment comes within the definition of blindness, the SDSW is authorized to recommend that aid be granted or restored without the formality of a hearing by the SSWB.

If the individual appeals on the basis of two adverse reports he may submit at his own expense additional reports of eye examinations made by physicians on the authorized list, and these reports will be presented on the hearing of the appeal.

The State Ophthalmologist shall have the privilege of examining the individual prior to the hearing of an appeal by the SSWB. If he refuses to submit to the examination or is inaccessible for it, the hearing will be on the basis of the reports already submitted. (Walc 3075, 3078, 3086, 3087.5, 3088.5, 3089, 3460, 3473, 3473.2, 3474.5)

B-264 NEUROPSYCHIATRIC EXAMINATIONS

B-264

If a physician skilled in diseases of the eye is unable to determine a definite visual acuity, or questions the degree of loss of vision claimed by the applicant or recipient, a second eye examination shall be made by another eye physician who is skilled in detecting pathology. If the second physician recommends a neuropsychiatric examination, the SDSW will designate a neuropsychiatrist and authorize an examination by him. A neuropsychiatric examination may be necessary to establish eligibility on degree of blindness if:

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- 1. There is no reported visual acuity,
- 2. There is absence of pathology, or
- 3. A diagnosis shows only photophobia, blepharospasm, ptosis, senility, mental aberrations, hysterical blindness, or neurological lesions.

B-279 EXPENSES IN CONNECTION WITH EYE OR NEUROPSYCHIATRIC EXAMINATIONS

B-279

No person shall be required to pay any part of the cost of an eye examination that is required by the SDSW in connection with his application for or continued receipt of aid. The cost of any examination required by the SDSW for the purpose of determining degree of blindness shall be paid by the county in the same manner as other expenses of the county are paid. The maximum fee which is considered proper county administrative expense for each eye examination is \$10.

A reasonable fee for a neuropsychiatric examination when required may be considered an allowable county administrative expense. (See Sec. B-264, Neuropsychiatric Examinations.)

Necessary transportation expenses within the county for eye examinations by a physician on the list, or outside the county when there is no physician so listed for that county, are allowable, and in ANB, are subject to federal reimbursement. (See Sec. B-756, Federal Participation in Administrative Costs.)

(WRIC 3075, 3083, 3083.1, 3460, 3462.1, 3471)

B-282 LIST OF AUTHORIZED PHYSICIANS FOR EYE EXAMINATIONS

B-282

ALAMEDA COUNTY

Capus, Bertram DeVaul, Charles H. Dickson, Owen C.	521 14th Street (Also in Contra Costa County) 1624 Franklin Street 2628 Telegraph Avenue	Oakland 12 Oakland 12 Berkeley 4
Gallaher, John A. Gump, M. E. Gunderson, Ernest O. Hessing, Ernest E. Hirst, William R. Howell, Homer P.	1327 Main Street 411 30th Street 2140 Shattuck Avenue 1904 Franklin Street 2241 Central Avenue 3022 E. 14th Street	Walnut Creek Oakland 9 Berkeley 4 Oakland 12 Alameda Oakland 1
Magrath, Wm. A. S. Padden, E. H. Schnoor, Thomas G. Sharpsteen, Jay Randolph Stephens, B. M. Stephens, Stuart B. Wold, Alvin P.	411 30th Street 1624 Franklin Street 400 29th Street 426 17th Street 2241 Central Avenue 2241 Central Avenue 400 29th Street	Oakland 9 Oakland 12 Oakland 9 Oakland 12 Alameda Alameda Oakland 9

B-273 (Continued)

ness in that Section.

Blindness is considered to have occurred in California if the individual meets the definition of blindness in Sec. B-246, and it is determined that his vision upon establishing California residence exceeded the definition of blind-

Example: It is determined that an individual had a central visual acuity of 20/100 and a field in excess of 20 degrees in the better eye at the time he established State residence. If his central visual acuity in the better eye is later determined to be 20/200 or less, or the field diminished to less than 20 degrees, the individual is considered to have become blind while a California resident.

If blindness is claimed to be the result of an accident, date and location of the event shall be verified and physician's report as to cause of blindness shall substantiate applicant's contention.

The following sources may provide helpful information as to the person's eye condition prior to application for aid:

- 1. Places where eye examinations were made during the preceding five years.
- 2. Agencies where physical or eye examinations were given for school admission, military service, insurance, etc.
- 3. Names and addresses of physicians who treated applicant during preceding five years.
- 4. Names and addresses of hospitals which may have had contact with applicant during the preceding five years.
- 5. Applicant's history of maintenance during the preceding five years.
- 6. Affidavits or reports of interviews with employers, storekeepers, references, etc., as to loss of vision. Such affidavits or reports must contain the facts upon which the affiant's knowledge is based. (Walc 3040, 3041, 3042, 3075, 3430, 3431, 3432, 3460)

B-276 HOME EYE EXAMINATIONS

B-276

An eye examination in the home of the individual may be authorized by the county only when it has obtained a statement from the attending physician or, if there is no attending physician, a statement from the social worker, that it would constitute a physical or mental hazard for the person to be transported to the office of the examiner. Such a statement shall accompany the Physician's Report of Eye Examination, Form Bl 227, submitted to the SDSW. (See Sec. B-756, Federal Participation in Administrative Costs.) (Walc 3075, 3460)

B-282 (Continued)

B-282

KERN COUNTY

Baisinger, L. F. Lange, Harry W. McKee, Keith S. 2026 17th Street 1629 Truxton Avenue 1706 Chester Avenue Bakersfield Bakersfield Bakersfield

KINGS COUNTY

Bassett, Alberta R.

Van Sicklen Building

Hanford

LAKE COUNTY

Beil, M. Clemens

Upper Lake

LOS ANGELES COUNTY

Abraham, Samuel V. Albaugh, C. H.

Allison, Ray L.
Applebaum, Alfred
Appleby, Ruth
Armstrong, Richard C.
Balding, Grant
Balding, Willard V.
Baraff, Albert A.
Behrens, Herbert C.
Beigelman, M. N.
Bell, Nelson C.
Brandenburg, Kenneth C.
Brownsberger, Sidney
Bullis, John A.

Chamberlain, Calvin B.
Christensen, Eugene L.
Cooley, Arthur D.
De la Reina, Solomon
Dow, Julian N.
Ellis, O. H.
Endres, William J.
Faier, Herman I.

6363 Wilshire Blvd. 727 West 7th Street

6305 Yucca
5905 Pacific Blvd.
1425 Glendon Avenue
595 E. Colorado Street
101 S. Madison Street
101 S. Madison Street
1680 North Vine Street
226 N. Greenleaf Avenue
1930 Wilshire Blvd.
586 N. Main Street
110 Pine Avenue
727 W. 7th Street
3875 Wilshire Blvd.

Investment Building 727 West 7th Street 601 West 9th Street 224 Rosecrans Avenue 9730 Wilshire Blvd. 523 West 6th Street 523 West 6th Street 2007 Wilshire Blvd. (Also 9730 Wilshire Blvd.) Los Angeles 48 Los Angeles 17

Hollywood 28
Huntington Park
Los Angeles 24
Pasadena 1
Pasadena 5
Pasadena 5
Hollywood
Whittier
Los Angeles 5
Pomona
Long Beach 2
Los Angeles 5
Los Angeles 5

Pomona
Los Angeles 17
San Pedro
Manhattan Beach
Beverly Hills
Los Angeles 14
Los Angeles 14
Los Angeles 5

B-282 (Continued)

BUTTE COUNTY

Alexander, J. H.	lll W. 2nd Street	Chico
Bethel, Robert D.	1453 Downer Street	Oroville
Chiapella, J. O.	184 East Fifth Street	Chico
Plumb, C. E.	310 Main Street	Chico

CONTRA COSTA COUNTY

Capus, Bertram	427 Tenth Street	Richmond
	(Also in Alameda County)	
Dunphy, John	2023 MacDonald Avenue	Richmond
Ford, Harry G.	314 10th Street	Richmond
Harmon, Robert J. P.	314 10th Street	Richmond
Keppen, Ford F.	314 10th Street	Richmond

FRESNO COUNTY

Awtrey, Hugh	533 Patterson Building	Fresno l
Grayman, Harry M.	2900 Fresno Street Building	Fresno
Hunt, Wayne Alvin	1157 Fulton Street	Fresno
Steinberg, Theodore	719 Patterson Building	Fresno 1
Trowbridge, Dwight H.	2900 Fresno Street Building	Fresno
Whitten, R. H.	2900 Fresno Street Building	Fresno

HUMBOLDT COUNTY

Dolfini, Walter W.	730 Seventh Street	Eureka
Hoilien, Maurice J.	431 F Street	Eureka
Iverson, Herman A.	507 F Street	Eureka

IMPERIAL COUNTY

Clarke, William A.	107 South 5th Street	El Centro
Jaquith, George	116 North Plaza	Brawley

INYO COUNTY

Bambauer, L. S.	239 Academy Avenue	Bishop

2007 Wilshire Blvd.

B-282 (Continued)

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LOS ANGELES COUNTY (Continued)

Nugent, Maurice W.

Olkon, Dora Berkman
Penn, Sidney W.
Pollock, Franklyn J.
Popovich, Stephen John
Preston, Helen E.
Reed, Paul H.
Reynolds, Frederick G.
Robbins, Alfred R.
Roberts, Jay G.
Roberts, Walter L.
Rogers, John Brady
Ross, B. Cecelia

Schillinger, Robert J. Schuman, Irving Schwartz, Leo H. Seech, Stephen G. Shanedling, Phillip D. Sitney, Julian J. Smith, Dennis V. Smith, Harry A. Smith, W. Burr Snow, H. L. Southgate, Paul T. Steckler, M. I. Struble, Gilbert C. Thornburgh, Robert G. Van Riesen, Milton H. Weeks, Carrol L. Weiss, Herman Whalman, Harold F. Wilson, Clinton A. Wilson, Warren A.

Wright, Edwin S. Ziskin, Daniel E. Zugsmith, George S. Zankan, Leo

MARIN COUNTY

Denicke, Ernest W. Furlong

(Also 3761 Stocker Street) 8015 Beverly Blvd. 812 Pine Avenue 5720 Wilshire Blvd. 1930 Wilshire Blvd. 1136 West 6th Street 727 West 7th Street 6333 Wilshire Blvd. 1930 Wilshire Blvd. 1708 North Garey Avenue 727 West 7th Street 1401 South Hope Street 1318 2nd Street (Also 9754 Wilshire Blvd. 727 West 7th Street 5000 South Lucas Street 405 North Bedford Drive 2007 Wilshire Blvd. 6315 Wilshire Blvd. 4418 N. Vineland Avenue 110 Pine Avenue 226 North Greenleaf Avenue 727 West 7th Street 639 West 9th Street 117 East 8th Street 2007 Wilshire Blvd. 9730 Wilshire Blvd. 117 East 8th Street 229 North Central 1930 Wilshire Blvd. 6333 Wilshire Blvd. 727 West 7th Street 3875 Wilshire Blvd. 1930 Wilshire Blvd. (Also 9730 Wilshire Blvd.) 5061 Lankershim Blvd. 6317 Wilshire Blvd. 529 West 8th Street 1930 Wilshire Blvd

1010 B Street 1010 B Street Los Angeles 5 Los Angeles 8 Los Angeles 48 Long Beach Los Angeles 36 Los Angeles 5 Los Angeles 17 Los Angeles 17 Los Angeles 36 Los Angeles 5 Pomona Los Angeles 17 Los Angeles Santa Monica Beverly Hills Los Angeles 17 Los Angeles Beverly Hills Los Angeles 5 Los Angeles 48 North Hollywood Long Beach 2 Whittier Los Angeles 17 San Pedro Long Beach 2 Los Angeles 5 Beverly Hills Long Beach 2 Glendale 3 Los Angeles 5 Los Angeles 48 Los Angeles 17 Los Angeles 5 Los Angeles 5 Beverly Hills North Hollywood Los Angeles 48 San Pedro Los Angeles 5

San Rafael San Rafael

B-282 (Continued)

B-282

LOS ANGELES COUNTY (Continued)

Fairchild, Nora M.
Falk, S. M.
Faust, Jcseph Milton
Feldman, A. William
Fields, Jack
Fields, H. Maxwell
Godwin, Edmund D.
Goodman, Sanders A.
Gorrilla, Laurence Vincent
Gunzburg, Julian
Hale, Channing W.
Hare, Robert
Hartman, Deane C.
Harwood, David
Harwood, Samuel C.

Hillyer, Ernest C. Irvine, A. Ray, Jr. Irvine, S. Rodman Irvine, Wendell C. Johnson, Ernest D. Kaplan, Harry E. Kelson, Ralph H. Kinney, J. G. Landegger, George P. Lifschutz, Jacob Ludmerer, Sol Marrin, Charles Ainsworth McBride, June Parratt McCormick, William A. McCoy, Carroll A. McKellar, James H. Merkel, Emil E. Miller, Nathan H. Mills, Lloyd H. Mills, Lloyd H., Jr. Monaco, Louis Morris, Samuel A. Nees, Oliver R. Nesburn, Henry R. Norene, Robert A.

939 South Figueroa 701 South Hoyt Avenue 1930 Wilshire Blvd., 7705 Seville Avenue 4418 Vineland 405 North Bedford Drive Professional Building 724 South Victory Blvd. 12307 Ventura Blvd. 416 North Bedford Drive 342 Investment Bldg. 416 N. Bedford Drive 727 West Seventh Street 2969 E. Florence Avenue 105 San Vicente Blvd. (Also 514 E. Kelso Street 1033 Gayley Avenue 9730 Wilshire Blvd. 727 W. 7th Street 727 W. 7th Street 330 N. Garfield 1930 Wilshire Blvd. 353 E. Manchester Blvd.. 1137 2nd Street 3875 Wilshire, Suite 900 105 N. San Vicente 117 E. 8th Street 320 Wilshire Blvd. 1052 W. 6th Street 234 S. 1st Avenue 1122 North Brand 111 N. Hudson Avenue 125 E. Glenoaks Blvd. 4334 Leimert Blvd. 609 S. Grand Avenue 609 S. Grand Avenue 727 W. 7th Street 6381 Hollywood Blvd. 508 Times Building 1680 North Vine Street 727 W. 7th Street (Also 3761 Stocker Street)

Los Angeles El Monte Los Angeles 5 Huntington Park North Hollywood Beverly Hills Long Beach 2 Burbank Studio City Beverly Hills Pomona Beverly Hills Los Angeles 17 Huntington Park Beverly Hills Inglewood Los Angeles 24 Beverly Hills Los Angeles 17 Los Angeles 17 Alhambra Los Angeles 5 Inglewood Santa Monica Los Angeles Beverly Hills Long Beach 2 Santa Monica Los Angeles 17 Arcadia Glendale Pasadena 4 Glendale Los Angeles 8 Los Angeles 28 Los Angeles 28 Los Angeles 17 Hollywood Long Beach 2 Hollywood 28 Los Angeles 17 Los Angeles 8

B-282 (Continued)

B-282

RIVERSIDE COUNTY

Berke, Samuel D. Chapman, Vernon A.

Crawford, Walter J. Garrison, B. E. Harner, Clyde E.

Stone, Vean M.

Plaza Hotel Building N. Palm Canyon Dr. & Andreas Road

3910 Market Street 5019 Sierra Street

Palm Springs Clinic, 1091 N.

Palm Canyon Drive 3616 Main Street

Indio

Palm Springs Riverside Riverside

Palm Springs Riverside

Sacramento 14

Sacramento 14

Sacramento

Sacramento

SACRAMENTO COUNTY

Berg, John A. Fritschi, Ulrich A. Gray, John Edward Holstein, Theodore Kelsey, T. W. McKee, C. B. Wagner, Alfred W.

Medico-Dental Building Medico-Dental Building 2901 Capitol Avenue 2912 Capitol Avenue Forum Building

Sacramento 14 California State Life Building Sacramento 14 Medico-Dental Building Sacramento 14

SAN BERNARDINO COUNTY

George, A. R. George, Lewis C. Hadley, Carl M. Hooval, John H. Hull, Frederick H. Moose, Ray M. Prough, Wendell A. Quinn, W. R. Smith, John J. Witter, Gordon L.

291 E. Street 291 E. Street Platt Building 124 East F Street 1348 D Street 575 5th Street 326 North Laurel Avenue 47 East Vine Street P. O. Box 864 2 West Fern Avenue

San Bernardino San Bernardino San Bernardino Ontario San Bernardino San Bernardino Ontario Redlands Twenty-nine Palms Redlands

SAN DIEGO COUNTY

Berends, E. D. Bond, Floyd M. Jaquette, Mary C. Kilgore, George L. Koke, Martin P. Lauren, George P. Lucic, Hugo

625 Broadway San Diego Bank of America Building San Diego 1 111 North Orange Avenue El Cajon 3315 4th Avenue San Diego 3 San Diego 3 Medico-Dental Building 205 Medico-Dental Building San Diego 3 Medico-Dental Building San Diego 3

BLINDNESS

B-282 (Continued)

B-282

MENDOCINO COUNTY

Keasler, J. B.

Lawnvale

MERCED COUNTY

McDowell, B. E. Willison, Eugene E.

205 Bank of America Bldg. Shaffer Building

Merced Merced

MONTEREY COUNTY

Clark, Howard E.
Dong, Emmo O.
Glasgow, Stanley Condit
Griess, R. O.
Hastings, S. W.

576 Hartnell Street 255 Main Street 600 South Main Street 8 East Alisal Street Professional Building Monterey Salinas Salinas Salinas Monterey

NAPA COUNTY

Hunt, Carson E. Kittle, Dallas B. 2107 Jefferson Street 1333 Jefferson Street

Napa Napa

NEVADA COUNTY

Powell, Barton J.

224 South Church Street

Grass Valley

ORANGE COUNTY

Calvy, William J.
Currey, Hiram M.
Elliott, Arthur C.
Francis, Raymond
Johnston, S. Theron
Maxwell, H. C.
Sellon, George I.

117 North Claudina Street 311 South Main Street 620 North Los Angeles Street 1424 North Broadway 1520 North Main Street 1718 North Main Street 213 North Pomona Avenue

Anaheim
Santa Ana
Anaheim
Santa Ana
Santa Ana
Santa Ana
Fullerton

PLACER COUNTY

Miller, William M.

320 Aeolia Drive

Auburn

B-282	(Continued
D-202	(Continued

B-282

SAN JOAQUIN COUNTY

Broaddus, C. A.
Brody, Yale
Plageman, William H.
Powell, Dewey R.
Powell, James R.
Saslaw, Lewis B.
Tipshus, Alfons F.

242	North Sutter Street
127	East Acacia Street
242	North Sutter Street
Medi	ico-Dental Building
Medi	co-Dental Building
Bank	of America Building
242	N. Sutter Street

Stockton	2
Stockton	
Stockton	2
Stockton	2
Stockton	2
Stockton	
Stockton	2

SAN LUIS OBISPO COUNTY

Beresky	, T:	ibor
Kelker,	G.	David

1170	Marsh
7710	mar on

San	Luis	Obispo
Cayı	icos	

SAN MATEO COUNTY

Murphy,	William H.
Sharpe,	Otis Allen
Sherwood	l, Robert O.
Westsmit	ch, Richard A.

205 3rd Avenue	
251 Park Road	
128 Primrose Road	
30 South El Camino	Real

1525 State Street 1515 State Street

San Mateo
Burlingame
Burlingame
San Mateo

SANTA BARBARA COUNTY

Campbell, J. Gary
Gibb, W. Blake
Hombach, Frank J.
Loutfallah, Michel

die Diamo	TOTO DUAGE DUICE
Hombach, Frank J.	1421 State Street
Loutfallah, Michel	1826 State Street
er spakreiget frame	(Also Ventura County)
Mesirow, Maurice E.	117 E. Cook Street
Richards, John M.	1534 State Street
von Zelinski, W. F.	22 W. Islay Street
	4. C. (

Santa	Barbara
Santa	Barbara
Santa	Barbara
Santa	Barbara
Santa	Maria

Santa Barbara

Santa Barbara

SANTA CLARA COUNTY

Beard, Crowell
Cassell, Irving
Lee, Dorothea
Martin, P. T.
Reinhardt, Paul H.
Rosehill, David B.

St. Claire Building
St. Claire Building
Medico-Dental Building
Medico-Dental Building
300 Homer Avenue
Bank of America Building

San	Jose	23
San	Jose	23
San	Jose	20
San	Jose	20
Palo	Alto	0
San	Jose	16

B-282 (Continued)

B-282

SAN DIEGO COUNTY (Continued)

Merrill, H. Ross	3251 4th Avenue	San Diego 3
Merwin, Thomas Keery	3318 4th Avenue	San Diego
Frendergast, John J.	2001 4th Avenue	San Diego l
Ravin, Oscar G.	233 A Street, Suite 405	San Diego
Rowland, Alan L.	Bank of America Building	San Diego 1

SAN FRANCISCO COUNTY

Aiken, Samuel D.	384 Post Street	San	Francisco	8
Barkan, Otto	490 Post Street		Francisco	
Bettman, Jerome W.	2400 Clay Street	San	Francisco	15
Blak, Einar V.	1801 Bush Street		Francisco	
Borley, William E.	655 Sutter Street		Francisco	10.52
Boyle, S. F.	490 Post Street		Francisco	
Brinckerhoff, Albert J.	490 Post Street	San	Francisco	2
Campion, George S.	490 Post Street	San	Francisco	2
Carman, Henry F.	60 Vicente Street	San	Francisco	16
Dickey, Clifford Allen	450 Sutter Street	San	Francisco	8
Edgerton, Ambrose Earl	450 Sutter Street	San	Francisco	8
Eissler, Rolf	2107 Van Ness Avenue	San	Francisco	9
Fine, Max	655 Sutter Street	San	Francisco	2
Hall, Thomas G.	516 Sutter Street	San	Francisco	2
Harrington, David O.	384 Post Street	San	Francisco	8
Harrington, John T.	450 Sutter Street	San	Francisco	8
Hicks, Avery	490 Post Street	San	Francisco	2
Hogan, Michael J.	450 Sutter Street	San	Francisco	8
Hosford, George N.	450 Sutter Street	San	Francisco	8
Jakobovits, Rafael	655 Sutter Street	San	Francisco	2
Kadesky, David	1801 Bush Street	San	Francisco	9
Lachman, George S.	450 Sutter Street	San	Francisco	8
McBain, Earle H.	490 Post Street	San	Francisco	2
Miller, Miriam	350 Post Street	San	Francisco	8
Mohr, Selby	450 Sutter Street	San	Francisco	8
Pischel, Dohrmann K.	490 Post Street	San	Francisco	2
Rodin, Frank H.	490 Post Street	San	Francisco	2
Shaffer, Robert N.	490 Post Street	San	Francisco	2
Smith, Joseph G.	450 Sutter Street, Room 1918	San	Francisco	8
Tesauro, Nicholas	384 Post Street, Room 901	San	Francisco	

B-282 (Continued)

B-282

TEHAMA COUNTY

Frey, Russell G.

737 Washington Street

Red Bluff

TULARE COUNTY

Keiper, George F.

113 North Church Street

Visalia

VENTURA COUNTY

Cavins, Carl S. Howarth, E. M.

Loutfallah, Michel

Morrison, A. A. Stansbury, John R.

804 W. 5th Street Oxnard
705 Main Street Santa Paula
468 East Main Street Ventura

(Also Santa Barbara County)
34 North Ash Street Ventura
Ventura

YOLO COUNTY

Graeser, Henrik S.

507 Main Street

Woodland

YUBA COUNTY

Hodgin, Robert I. Montana, Rocco 603 D Street 725 4th Street Marysville Marysville

OTHER STATES

Clarke, Samuel Tracy Cope, Beverly A. Emmens, Thomas H. Magee, George R. Moulton, Olin C. Medico-Dental Building

207 Fluhrer Building 129 N. Virginia Street Medico-Dental Building Reno, Nevada Ashland, Oregon Medford, Oregon Reno, Nevada Reno, Nevada

B-282

B-282 (Continued)

SANTA CLARA COUNTY (Continued)

Smith, Herbert Gordon	261 Hamilton Avenue	Palo Alto
Tanner, Owen R.	300 Homer Avenue	Palo Alto
Thygeson, Phillips	87 North 6th Street	San Jose
Walsh, Alton	311 South 1st Street	San Jose 33

SANTA CRUZ COUNTY

Bivins, Thomas E.	526 Soquel Avenue	Santa Cruz
Hombach, Leo J.	345 Church Street	Santa Cruz
Shenk, Frederick P.	Medico-Dental Building	Santa Cruz
Spencer, James A.	135 Montevista Avenue	Watsonville

SHASTA COUNTY

Otten, Alex J.	2124 Market Street	Redding
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SOLANO COUNTY

Green, John W.	1727 Sonoma Blvd.	Vallejo
Johnson, Malcolm C.	1004 Marin Street	Vallejo
Madeley, H. Randall	1727 Sonoma Blvd.	Vallejo
Marchand, D. C.	1727 Sonoma Blvd.	Vallejo
Marquette, M. L.	1727 Sonoma Blvd.	Vallejo

SONOMA COUNTY

Dick, Noble	618 4th Street	Santa Rosa
Every, Herbert M.	600 B Street	Santa Rosa
O'Connor, C. Addison	816 4th Street	Santa Rosa
Patterson, Gilbert L.	1116 Mendocino Avenue	Santa Rosa
Sannella, Lee S.	200 4th Street	Petaluma
Spear, J. Leslie	576 B. Street	Santa Rosa

STANISLAUS COUNTY

Mottram, L. D.	1115 I Street	Modesto
Porter, James A.	1024 J Street	Modesto

107-30

108-30 107-55

107-75 108-25 108-40

109-15 108-50 109-25

107**-**00 108**-**55

108-60

B-304 AGE REQUIREMENTS

B-304

No person is eligible for aid unless he is at least 16 years of age. (W&IC 3040, 3041, 3075, 3430, 3431)

B-308 DETERMINATION OF AGE

B-308

If it appears questionable that an applicant is 16 years of age, and because of conflicting information or inability to give such information, it should be necessary to determine his age, any of the following sources of evidence may be explored in an effort to determine the correct age:

- 1. Birth certificate or certified copy, or family Bible record.
- 2. Written verification from the Recorder or Bureau of Vital Statistics.
- 3. Baptismal record or statement from the church.
- 4. School records
- 5. Records of an insurance company, physician, or hospital.
- 6. Newspaper notices, if they give name of child and parents and the date and place of birth.
- 7. Letters, if they are identifiable with the event and give the necessary information.
- 8. Social Agency records.
- 9. Indian Agency records.
- 10. Census records.
- 11. Institutional records.

(W&IC 3040, 3041, 3075, 3430, 3431, 3460)

B-316 (Continued)

- 1. There can be only one residence.
- 2. Residence once acquired continues until the person abandons it and acquires residence elsewhere.
- 3. Residence can be changed only by union of act and intent. However, an intent to return to a place of former residence at some indefinite time in the future shall not be construed as meaning one does not have residence where he is currently living.

"Residence" as defined above does not connote any particular length of residence as required as a condition of eligibility. (W&IC 3042.10, 3075, 3460, Govt. Code 244)

B-319 COUNTY RESIDENCE -- GENERAL

B-319

The period of county residence to be completed before county participates in payment of aid is:

One year for applicants who became blind while not California residents. Six months for applicants who became blind while California residents.

A period of county residence prior to date of application is not a requirement for eligibility for aid. However, length of residence in the county of application determines which governmental units participate in payment of aid. The State reimburses in full the amount of aid paid by the county to an eligible recipient until the required period of county residence has been completed.

Applicants or recipients shall have the same freedom of movement and choice of residence accorded other residents of California. The county should inform applicants or recipients that such freedom of movement within the State entails administrative action, and therefore they should notify the county of changes in residence in order to insure continued payment if in need. (Walc 3040, 3041, 3042, 3042.10, 3075, 3090, 3430, 3431, 3432.1, 3433, 3450, 3460)

B-322 NON-COUNTY RESIDENCE PROCEDURE

B-322

Except as determination of eligibility relates to residence, applications involving non-county aid are handled in exactly the same manner as those in which the county participates in the payment of aid. (See Sec. B-703, Transfer of Aid Procedures)

The county shall determine when aid is to be paid on a non-county basis by obtaining the following:

121-00, 121-10 121-15, 121-17 121-30

B-313

B-313 ELIGIBILITY REQUIREMENTS

D-040 CETIGIBIEILI KEQOIKEMENIC

ANB

The eligibility requirements for residence for applicants of ANB fall into two classifications:

- 1. A person who became blind while not a resident of California must reside in this state and have so resided continuously for at least one year immediately preceding the date of his application, and for a total of five years within the nine years immediately preceding the date of application.
- 2. A person who became blind while a resident of California must reside in this state at the time of his application. No specific length of prior residence is required.

APSB

- 1. An applicant for APSB who became blind while not a resident of California shall have been a resident of the State for a period of ten years immediately preceding the filing of his application. Exception: A blind person who matriculates at an institution of higher learning in this state, to work for a degree or certificate, is eligible for APSB if he has been a resident of California for five out of the last nine years, the last one of which must immediately precede the date of application.
- 2. No specific length of residence is required if applicant became blind while a resident of California.

An applicant for ANB or APSB who became blind while visiting, without intent of residing in California, would not be considered to have become blind while a resident of this state. (W&IC 3040, 3042, 3043, 3075, 3090, 3090.5, 3430, 3431, 3432, 3451, 3460)

B-316 DEFINITION OF RESIDENCE -- GENERAL LAW

B-316

120-00, 120-05

Every person shall be considered to have residence at the place where he is living, if he is found to be living there voluntarily and not for a temporary purpose.

Residence in California is defined as the place where one remains when not called elsewhere for labor or other special or temporary purpose, and to which one returns in seasons of repose. The following concepts shall be taken into consideration in determining residence:

B-328 VERIFICATION OF STATE RESIDENCE

B-328

232-10 Restated The affidavit of one reputable citizen is required to establish that the applicant meets the required period of state residence.

The Affidavit Regarding Residence of Applicant, Form Bl 221, is used for this purpose. The affidavit shall include a statement of facts on which the affiant bases his knowledge of the period of residence. If one affidavit is not sufficient to verify the applicant's residence for the entire period required, additional affidavits may be obtained until evidence for the full period is on file. The signature on the form shall be acknowledged by a person qualified to acknowledge an affidavit.

129-00 Restated

In case such an affidavit is not available, residence may be verified by papers or documents in applicant's possession, or other evidence, such as:

- 1. Rent or utility receipts or accounts covering a continuous period;
- 2. Social agency records;
- 3. Physicians' and lawyers' records;
- 4. Mail addressed to the applicant;
- 5. Lodge or club records.

If residence is **v**erified by means of the OAS record or other public assistance records, the worker must make an affidavit of residence based on the information contained in such record or records. (W&IC 3075, 3083, 3460, 3471) (See Sec. B-334, How Residence is Lost)

B-331 HOW RESIDENCE IS GAINED

B-331

California residence may be established by a person who comes to this state with an intent to stay. It is presumed that residence began on the date of arrival in determining length of residence. (Walc 3042.10, 3075, 3460, Govt. Code 244)

B-334 HOW RESIDENCE IS LOST

B-334

A person who removed to another State or country with the intention of establishing residence there loses California residence immediately, even though he may intend to return to California at some future date. California residence is lost at the moment that, by act and intent, he begins residence elsewhere. Only by union of act and intent can California residence again be established.

Aid shall be discontinued as of the last day of month of departure, or of month in which residence is lost by coincidence of act and intent.

B-322 (Continued)

- 1. Evidence of applicant's State residence. One completed Affidavit of Residence, Form Bl 221, if available; otherwise other suitable evidence. (See Sec. B-328, Verification of State Residence)
- Applicant's Affidavit of Intent As to Residence, Form AB 204.
- 3. Verification of date applicant established residence in present
- 4. Verification of date residence in county of application was lost if

applicant formerly had residence in another county after an acted upon county aid. Ordinarily the form is completed at the time the application is signed. If the applicant establishes residence in another county after an application has been filed but before the board of supervisors has acted upon it, the form is completed after residence in the second county has been established.

The applicant certifies to the date on which he came to the county and the date on which by intent he established residence therein. He also reports as accurately as possible his whereabouts for the past three years immediately preceding the date of application and reason for each removal. If this report shows that the applicant formerly lived in the county in which the application is made, determination shall be made as to whether this residence has been lost. There may be instances when the history of the applicant's residence over a longer period must be secured but, generally, a record of his whereabouts for the past three years is sufficient.

The county in which the applicant is actually living shall accept the application for the county of residence and shall, without delay, submit the signed application, together with all available and pertinent information, to that county. The county of residence shall complete the determination of eligibility. (For exception see Sec. B-160, Application of Patient on Leave from State Hospital)

If a county in which an applicant is living accepts an application and grants aid, the SDSW will reimburse on a joint basis until county responsibility or non-county status is determined. If this determination has been made, the SDSW will make the proper reimbursement adjustment. (Watc 3040, 3041, 3042, 3042.10. 3075, 3090, 3430, 3431, 3432, 3433, 3450, 3460)

B-325 CHANGE OF COUNTY RESIDENCE WHILE APPLICATION IS PENDING

(See Sec. B-150)

B-325

B-340 (Continued)

B-340

Temporary absence from the state with intent to return to California does not interrupt residence already acquired in this state and such periods of absence are included when computing length of residence.

Absence from county of residence for specific purposes, or for temporary periods only, with intent to return to the county, does not interrupt residence already acquired in that county. Such periods are included when computing the length of county residence.

Temporary absence includes absence for such purposes as:

- 1. Visiting or seeking employment
- 2. Employment which entails travel, such as that of salesmen, merchant seamen, migratory workers, and entertainers.
- 3. State or U. S. business or employment, including military service.
- 4. Confinement in a prison or commitment to a public hospital.
- 5. Attending an educational institution.
- 6. Employment in relief camp, etc.

If a person claims to have retained California residence during periods of absence, he must offer adequate evidence to support his contention. Reasons for leaving California, activities during absence, and reasons for returning to State, all should be given due weight, as intent is sometimes difficult to prove when not supported by physical presence.

The more common types of evidence used to determine intent as to residence are:

- 1. Maintenance of a home in this State;
- 2. Storage of possessions in this State;
- 3. Exercise of voter's privilege, i.e., casting absentee voter's ballot in election in this State;
- 4. Return to State immediately upon termination of cause of absence;
- 5. Return to State during seasons of repose;
- Expression of intent to retain residence in this State in correspondence with relatives, friends, or others, written prior to or during absence;
- 7. Purchase of round-trip ticket at time of departure;
- 8. Expression of intent, prior to departure, to neighbors, school, church or lodge officials, substantiated by affidavits of such persons;
- 9. Securing non-resident hunting, fishing or automobile permit in other state.

(Section Continued on Next Page)

124-15 124-25 124-25

121-45

B-334 (Continued)

B-334

If investigation reveals that a person who has been absent for purposes of employment, or for any other cause, had established a residence in another state, or country, his California residence for the period in question would be lost regardless of the length of absence.

If such a period of absence with intent to establish residence in another state or country occurred within the year prior to application, it is necessary for ANB applicants who became blind while not California residents, to complete one full year of residence subsequent to re-establishment of residence in this State and prior to application before aid may be granted.

If such a period of absence has occurred within ten years prior to the date application for APSB is filed by one who became blind while not a California resident, aid may not be granted under this category. Ten full years of residence subsequent to re-establishment of residence by union of act and of residence subsequent to re-establishment of residence by union of act and intent shall be completed before application for APSB may be granted. (WAIC 3075, 3460) (See Sec. B-331, How Residence is Cained)

PHYSICAL PRESENCE AND INTENT B-337

B-337

Before residence is gained, it is necessary that there be physical presence and intent to establish residence in a certain place. The factor of intent involves, as a prerequisite, ability to make a choice. Therefore, anyone entering the State without such ability could not establish a residence here. This would include persons brought into the State under arrest, such as Federal prisoners destined for Alcatraz or for county jails functioning as Federal prisons, persons extradited from other states in which they had established residence, escaped prisoners, paroled prisoners, and others of similar status. (Walc 3042.10, 3075, 3460) (See Sec. B-358, Residence While on Parole)

B-340 TEMPORARY ABSENCE

B-340

Retention of a continuous period of California residence preceding application or restoration is not important to applicants or recipients who became blind while California residents, as such a period of State residence immediately prior to filing application or request for restoration is not an eligibility requirement in such cases.

B-343 (Continued)

B-343

The residence of a minor, whose parents do not live in this state and who has no legal guardian residing in this state, is determined by the physical presence of the minor in this state. Such a minor loses California residence upon departure from the state regardless of intent and is ineligible as of the last day of that month. However, if the minor returns during the following month and aid is restored as of that month, so that payments do not cease, his absence may be deemed of no consequence and residence is considered to have continued without interruption.

If a minor child for whom aid is requested is actually living in a different county than the one in which his residence is established by his parent, guardian, a court, or otherwise, application shall be made in the county of his established residence. Financial participation in payment of aid in such a case is based on the length of minor's residence in county of application regardless of his physical presence in a different county.

So long as residence acquired in the county granting aid is not terminated by the person through whom child's residence is determined, or custody is not vacated or transferred by court order, there would be no change in residence status of the child. (WRIC 17.1, 3042.10, 3075, 3433, 3460)

B-346 RESIDENCE OF MARRIED WOMEN

B-346

For the purpose of receiving aid, neither the domicile nor residence of husband or wife shall be deemed to be the residence or domicile of the other. Each may have a separate residence or domicile, dependent upon proof of the fact and not on legal presumptions. In the absence of proof that husband and wife have separate residence status, they may be presumed to have but one which would be determined in accordance with Section B-316, Definition of Residence - General Law. Residence is neither gained nor lost as a result of marriage.

If a woman recipient transfers, following marriage, to the husband's place of residence, arrangements shall be made for an intercounty transfer of aid. (Well 3042.10, 3075, 3433, 3460; AGO 10322, 10367, NS1016, NS1065, NS1793)

B-349 RESIDENCE OF INCOMPETENTS

B-349

Incompetency is a finding of the court and is not a factor in determining residence unless:

(Section Continued on Next Page)

Lari-

B-340 (Continued)

B-340

A person who is employed in government service or in private business which takes him from the state does not lose California residence solely by reason of his absence. If his family lives in California, and his home port, home address, or center of business affairs remains in this state, there is strong presumption that there has been no change in residence by act and intent. However, this does not preclude the possibility that a different residence might not have been established elsewhere by union of act and intent.

Persons to whom the above most frequently applies are: federal and state employees, members of the armed services, traveling salesmen, merchant seamen, circus employees, migratory workers, etc.

A California resident extradited because of an offense committed elsewhere, whether such act was committed before or after establishment of California residence, would not be considered to have lost California residence because of extradition or because of absence while held under duress in another state or county. (WaIC 3075, 3460)

B-343 RESIDENCE OF MINORS (BETWEEN 16 AND 21 YEARS OF AGE)

B-343

The residence of an applicant who is a minor is determined as follows:

The residence of the father, during his lifetime, determines that of the child. After his death, residence is determined by the mother while she remains unmarried, and then by her husband upon remarriage.

In the absence of a parent or husband the minor's residence is established by the legal guardian.

An applicant is considered to have resided in California during any period in his minority when the person determining his residence resided here.

If an applicant is a minor who became blind while physically present in California, (regardless of the residence of the person determining his residence) to he is considered to have become blind while a resident of California and no length of residence is required as a condition of eligibility.

If an applicant became blind during his minority, while out of the state, but while the person determining his residence was a resident of California, he is considered to have become blind while a resident of California, and no length of residence is required as a condition of eligibility.

B-361 RESIDENCE IN INSTITUTIONS

B-361

A recipient who is living in a private or public institution, or a person whose residence determines that of a minor recipient may, by act and intent, make the county in which the institution is located his county of residence, or he may retain residence status he had prior to entrance in the institution. (W&IC 3075, 3460)

B-364 EFFECT OF DEPENDENCY ON RESIDENCE

B-364

Dependency or receipt of aid or relief through any county in this State is an irrelevant factor in determining residence for purpose of eligibility.

Aid shall not be denied an applicant solely because he received aid or relief from another state or one of its political subdivisions while physically present in this State. If residence in another state or its subdivision is a condition to the granting or continuance of aid or relief, this may be considered as evidence indicating an intent to retain residence in that state. Such evidence may be refuted by other evidence indicating an intent to establish residence may be refuted by other evidence indicating an intent to establish residence of dence in this State. In cases of conflicting evidence, a preponderance of evidence is accepted. (W&IC 3075, 3460)

B-367 REAPPLICATION BY FORMER RECIPIENT WHO RETAINED STATE RESIDENCE

B-367

A former recipient whose aid has been discontinued for cause during absence from the State, but who has retained California residence by intent, would not be considered to have intermented big California would not be considered to have interrupted his California residence, and aid may begin immediately upon physical return to the State if he is otherwise eligible.

Return to County Other Than County of Residence

If the former recipient who has been physically absent from the State but The former recipient who has been physically absent from the State but the has retained legal residence in California, returns to a county other than that of residence, his application shall be taken by the second county.

Aid granted in the amount to which the applicant is eligible will be reimbursed in full by the State until the first day of the month following completion of one year's continuous county residence in a single county (six months in the case of applicants who became blind while California residents.) (W&IC 3040, 3042, 3043, 3075, 3430, 3431, 3432, 3460)

B-370 REAPPLICATION BY FORMER RECIPIENT WHO LOST STATE RESIDENCE

B-370

A former recipient who lost State residence, assumes the status of a new applicant insofar as residence requirements are concerned. (See Sec. B-334, How Residence is Lost) (WAIC 3075, 3460)

B-349

B-349 (Continued)

(1) a guardian of the person has been appointed, or

(2) the person has been found incompetent under the provisions of Sec. 5076 of the W. & I. Code.

A court, in finding a person incompetent, may commit him to a public institution, or commit him to the care and custody of the counselor in mental health, or appoint a guardian for him.

The residence of one for whom a guardian of the person or a counselor has been appointed is the residence of the ward at the time letters of guardian-ship were issued. Residence of such a person may be changed only by the union of the guardian's or counselor's intent and some act in relation to the ward such as the ward's removal to another county. (See Sec. B-155, Guardianship) (W&IC 3075, 3460) Prob C 1460, 1500)

B-352 CUSTODIAL OR CORRECTIONAL INSTITUTION RESIDENCE

B-352

The residence of one who is confined in a prison, or who is under commitment under W. & I. Code Section 5076 is that which he had immediately prior to confinement or commitment. Time spent in a public custodial or correctional institution is considered in computing State and county residence, both for the year immediately preceding the date of application and for the required prior residence. A person establishing residence for a minor may complete residence requirements including county residence while in or on parole from a public institution. (W&IC 3075, 3460)

B-355 RESIDENCE ON FEDERAL PROPERTY

B-355

Persons living upon land owned or leased by the U. S., but not subject to the exclusive jurisdiction thereof, may acquire State and county residence. Such land includes housing projects constructed by the FWA and the USHA and all land leased by U. S. agencies from the State, political subdivisions, or individuals. In all other cases, the extent of Federal jurisdiction shall be determined by an examination of the manner in which the property was acquired by the U. S., the statutes under which it was acquired, the statutes authorizing maintenance of the housing project, and the State statutes applicable to such acquisition. Examples of lands under the exclusive jurisdiction of the U. S. are some military reservations and federal prisons such as Alcatraz. Conclusion that exclusive jurisdiction is vested in the U. S. shall not be reached in the absence of express statutory provision or law. (WAIC 3075, 3460)

B-358 RESIDENCE WHILE ON PAROLE

B-358

The legal residence of a person on parole, or leave of absence, from a State or Federal institution in this State is that which he had immediately prior to commitment to the institution. (WaIC 3075, 3460)

124-35, 120-05 Repeat

B-376

B=376 ABSENCE FROM STATE = CONTINUANCE OF AID AND REQUIRED REPORTS

If a recipient leaves the state for a temporary period without loss of California residence, aid shall be continued as long as residence is retained and the person remains otherwise eligible. He shall be required to inform the county of residence every two months regarding his living plan and his intent with respect to residence and to state the change, if any, in his income or financial circumstances.

If there is prolonged absence, the county may request the welfare agency in the community to interview the recipient to determine if need continues. If red etermination falls due during temporary absence from the state, such redetermination shall be made as provided in Sec. B-236, Redetermination During Absence From the State or County. (W&IC 3075, 3460)

B-382 DISPUTE ON RESPONSIBILITY FOR PAYMENT OF AID

B-382

If a dispute arises between two counties regarding county responsibility for the support of an individual, either county may submit the dispute to the SDSW. The SDSW shall weigh the evidence presented and fix responsibility for support.

330-6

If a county wishes to refer to the SDSW a dispute with another county as to responsibility for payment of aid, Form DPA 6, Appeal as to Responsibility for Support, signed by the chairman of the board of supervisors, shall be submitted in triplicate to the SDSW. Additional data shall be submitted to the SDSW with Form DPA 6 and should include information as to the counties in which the applicant has resided with the dates of such residence, and a statement of the points on which there is disagreement.

Upon receipt of the appeal, the SDSW sends a copy of Form DPA 6 to the chairman of the board of supervisors and county welfare director in the other interested county or counties and requests a report from them. If no reply is received from the other county or counties within 30 days, the SDSW renders its decision on the basis of the facts known to it.

If no conflict is revealed in the facts reported by the counties, such facts are presumed to be correct. If a conflict exists, the SDSW draws this to the attention of the counties concerned and requests an additional investigation and report. As a general rule, the SDSW does not make an investigation or interview the person concerned but renders its decision upon the basis of the facts presented by the counties. The decision of the SDSW may be appealed to the SSWB.

In an appeal to the SSWB the decision of the SDSW is presented and the counties submit their contentions by letter, brief, or verbal argument at the time of hearing. (W&IC 3075, 3092, 3460, 3463)

B-403 (Continued)

B-403

When property is determined to be separate property of spouse, the fact that name of applicant or recipient may appear in a deed transferring the property, or on an instrument which is basis for a loan, is not evidence that the property is community property. Signature of both husband and wife is required by many banks and other lending agencies, even though the instrument (mortgages, etc.) is secured by separate property of one spouse.

The following rules apply when property is bought with mixed funds, i.e., commingled funds:

- 1. When each fund is clearly ascertainable, its character remains unchanged. Thus, when land is purchased there may be both a separate and community interest in it.
- 2. If the funds cannot be traced, the presumption is held to be in favor of community property and the property will be considered community property.

Improvement of community and separate property—if community funds are used to improve separate property, a distinction is made between the separate property of the wife and that of the husband:

- 1. When husband, who has power to control community funds, voluntarily improves wife's separate property, he is presumed to have intended the whole to become her separate property, unless there is an agreement to the contrary.
- 2. If husband improves his own separate property, wife cannot object and her silence is not held to be evidence of consent as she has no control over disposition of community funds. While the property belongs to husband, wife is entitled to compensation to the extent that her share of the community funds increased its value.

Separate property—all property of the husband (or wife) owned by him (or her) before marriage and that acquired afterwards by gift, bequest, devise, or descent, with the rents, issues, and profits thereof, is his (or her) separate property. The wife may without the consent of her husband, convey her separate property.

Unless the husband has conveyed an interest in such property to the spouse it remains the separate property of the husband.

Equity in property is the value accruing to owner after deducting total liabilities such as mortgages or liens held against property, or unpaid balance due on purchase contracts from current market value of property. Equity is the amount by which assets exceed liabilities. (Wall 3047.24, 3075, 3447, 3460)

(Section Continued on Next Page)

lossary

B-403

B-403 DEFINITIONS OF PROPERTY

Real property is considered to be property which is immovable but includes any place of abode of an individual, whether house, boat, trailer, or other habitation. Ownership of stock in a water company not appurtenant to the land shall be considered real property to the extent of and in the amount necessary to obtain water for agricultural purposes.

Burial space is generally considered real property.

Personal property is all property which is not real property.

Community property -- property acquired by the husband and wife, or either, during marriage, when not acquired as the separate property of either, is community property.

The most common method of acquiring community property is by the earnings of either the husband or the wife during their marriage. There are, however, certain exceptions:

- 1. When the wife is sole trader, as defined in the C.C.P., Sec. 1811, her earnings are her separate property.
- 2. When the wife is separated from the husband, her earnings and accumulations as well as those of the minor children whose custody she has, are her separate property. This does not apply if they are separated temporarily because of their work, even though the separation is for a considerable period. It only applies when the parties live apart without the present intention to resume marital relations.
- 3. When the husband relinquishes his wife's earnings to her, they become her separate property. The husband may relinquish to the wife the right to her earnings during marriage without any consideration other than their mutual consent, and thereupon said earnings become her separate estate. In the absence of an agreement between a couple whereby the wife is permitted to retain her earnings as her separate property, the earnings of the wife represent the income of the husband, and they are under his management and control.

Property purchased on personal credit of either spouse becomes community property. But if property is purchased on credit of separate property, it becomes separate property.

Property purchased with funds from sale of other property retains the character of the property sold as long as source can be traced.

B-409 (Continued)

B-409

Real property may be owned

- 1. As separate property
- 2. As community property
- 3. In joint tenancy
- 4. In tenancy in common
- 5. In a partnership
- 6. By a corporation (CC 669 et seq.)

The proceeds from conversion of real property into personal property may be considered real property for a period of time under certain circumstances. (See B-457 (11))

The current county assessed value of real property shall be taken into account in determining eligibility, i.e., the value of real property as entered on the records of the assessor of the county in which the property is located. The actual value of real property or its salability is not a factor to be considered in determining assessed valuation for eligibility purposes. (AGO NS308)

If exemptions for tax purposes are deducted from the assessed value before entry in the assessor's record or on the tax statement, the exact amount of exemption shall be added to the recorded sum to determine the true assessed value.

Property, both within and without the state, is included in the assessed value of real property.

Information pertaining to real property and encumbrances thereon shall be retained in the case record or recorded in the narrative. The recording of interviews or of examination of documents where verification is necessary, shall include the source, the findings, the dates of steps in the investigation, and the names of those participating in the determination. A complete explanation of any complicated situation regarding the property shall be included in the record. (Walc 3047, 3075, 3447, 3448, 3460)

B=412 OWNERSHIP OF SEPARATE AND COMMUNITY REAL PROPERTY

B=412

In the absence of a final decree of divorce, the status of the community property of an applicant or recipient and the spouse is considered. If a legal property settlement has been made, but no actual divorce has occurred, the terms of the property settlement determine the status of the property.

In APSB, determination of the status of all real property as separate or community is necessary. Only the separate property of applicant and his share of community property is considered in determining eligibility. All

(Section Continued on Next Page)

132-25 sstated 135-40

132-10

132-15

233-00 Restated

131-15 Restated in line with DB 420 also 234-25

131-12 Restated

B-406 REAL PROPERTY ELIGIBILITY REQUIREMENTS

B-406

1. ANB: Aid shall not be granted to any person who together with his spouse owns real property the county assessed valuation of which, less all encumbrances thereon of record, exceeds \$3500.00.

132-00 Restated DB 420

The separate real property of the spouse with whom applicant or recipient is not living in the same household shall not be included.

In cases of separation without intent to terminate the marital relation— ship, e.g., due to illness, employment, visits to relatives, etc., the separate real property of the spouse shall be included in determining

DB

Real property owned by an applicant or recipient shall be utilized to provide for his current needs. (See Sec. B-436, Utilization of Real Property.)

IB 426

2. APSB: Aid shall not be granted to any person who owns personal or real property, or both, the county assessed valuation of which, less all encumbrances thereon of record, exceeds \$3500.00.

the real property holdings of the applicant or recipient.

132-00

The applicant's or recipient's sworn statement with regard to ownership of property is acceptable, except when information obtained from him is inconsistent or when conflicting information is received.

(W&IC 3047, 3047.01, 3047.02, 3047.2, 3075, 3447, 3460)

DB 420

B-409 OWNERSHIP OF REAL PROPERTY

B-409

The term "owner" includes all persons who hold legal title to property. It also includes the vendor (i.e., the seller) and the vendee (i.e., the buyer) of real property under a contract of sale.

Restated

Property is considered owned if it is held

- 1. Clear of all indebtedness
- 2. Subject to mortgage, deed of trust, etc.
- 3. Subject to sale to another party under contract of sale
- 4. Subject to purchase from another party under contract of sale
- 5. As a homestead
- 6. In an undistributed estate provided the property is in fact available prior to distribution
- 7. Under lease for a period of not less than ten years and used for a place of residence of the lessee.

(CC 678, AGO NS 704, NS 778, NS 2387, NS 4943)

(Section Continued on Next Page)

Restate

B-424 LIFE ESTATE INTEREST

B-424

A life estate is a freehold interest which terminates upon the death of the owner. The life tenant has definite rights and responsibilities, such as payment of taxes, interest, assessments, upkeep and such expense as is necessary to keep the property in good condition, etc., and is entitled to all the income, if any, from the property. Occupancy of the property of the life tenant, unless specified in the instrument, is not necessary. Life estate represents an interest which is transferable, assignable, or which may be encumbered depending upon the type of life estate.

Upon death of a recipient of aid who holds a life estate interest in property, the property automatically goes to the remainderman.

The transfer of title to real property with reservation of the full privileges and responsibilities of life estate is not interpreted as a voluntary assignment or transfer of property for the purpose of qualifying for aid. (See Sec. B-490, Transfer of Property to Qualify for Aid.)

It is the presumption, which may be refuted, that a life estate agreement drawn more than two years prior to the application for aid stipulating that the remainderman shall be responsible for the payment of taxes, or for encumbrances which were not placed upon the property by him, was not made for the purpose of qualifying the recipient for a greater amount of aid than that to which he would otherwise be eligible. If it is established that the property was encumbered by the remainderman, either before or after the execution of the agreement creating the life estate and the agreement stipulates that the remainderman is responsible for payment of such encumbrance, payment made by the remainderman on such encumbrance does not represent income to the recipient.

There must be written evidence of life estate. Such evidence may appear in the body of the deed which is executed and delivered to the remainderman or may be evidenced by a separate written agreement between the parties, wherein the remainderman conveys a life estate to another and retains the remainder for himself. In order for the evidence to be complete and acceptable, such an agreement must be recorded. (See Sec. B-550, Income from Real Property.) (Walc 3075, 3460)

B=427 REMAINDERMAN'S INTEREST

B-427

The assessed valuation of real property in which a vested future interest is held shall be considered in determining eligibility of the remainderman. If the future interest is contingent, the value of the property shall not be considered in determining his eligibility.

A future interest is vested when the remainderman would have a right to the immediate possession of the property upon the ceasing of the intermediate or precedent interest such as life estate or other intermediate holding. Certain other types are considered contingent interests. It is suggested that whenever question arises as to whether the interest of the remainderman is contingent or vested it be referred to the district attorney for decision. (WAIC 3075, 3460; AGO NS2478, NS3811)

135-80

B-412 (Continued)

B-412

property which an applicant and his spouse hold is presumed to be community property unless applicant can give satisfactory evidence to the contrary. If verification is necessary, the responsibility rests with the applicant to present proof or supply information which will enable the county to determine the status of property. The fact that property is assessed or recorded in one name only does not necessarily indicate that the property is separate property. Where community property is involved, the interest of each spouse is considered as half the county assessed value of the property.

(W&IC 3047.2, 3075, 3447, 3460, CC 164, 687; AGO NS863, NS1715, NS5202, CC 159, 160)

B-415 VALUE OF UNASSESSED REAL PROPERTY

B=415

If an interest in real property, such as unpatented mining claims, timber, oil or mineral rights or leaseholds, cemetery property held for profit, etc., is declared but is not listed on the local assessment rolls, it shall be referred to the county assessor to determine whether or not it is assessable, and if assessable, its assessed value. The assessed value so determined shall be used. If the property is not assessable, the current market value shall be substituted for the county assessed value. (Walt 3047, 3075, 3447, 3460; Rev. & Tx. C 201, 531)

B-418 OWNERSHIP OF REAL PROPERTY BY INDIANS

B-418

In considering land occupied by Indians, special care must be exercised to determine ownerhsip of the land. The ward Indian has only an equitable interest in lands held in trust by the United States Government for him. Since title is held by the Federal Government, the property is not subject to assessment or taxation. The value of such property shall not be taken into consideration in determining the eligibility of the Indian. An Indian may live on the reservation and still own land, not a part of the reservation, in his own right, and all such real property shall be considered in determining eligibility. (Waic 3047, 3075, 3447, 3460; AGO 10933)

B-421 JOINT TENANCY OR TENANCY IN COMMON

B-421

If property is held in joint tenancy or in tenancy in common by one or more persons, the interest of each owner is deemed to be his equal proportionate share of the total assessed value of the property. (W&IC 3075, 3460; AGO NS466)

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131-06

132-4

B-436 (Continued)

B-436

property is a multiple unit dwelling (e.g., apartment or flats), or if it includes other separate housing units, that portion of the home property not occupied as the owner's household shall be utilized. "Home" includes the surrounding area which is normally used for the garden, family orchard, etc. If the surrounding area is so large that a portion of it could be rented, leased, or otherwise made to produce something of current benefit to the owner without restricting the use of his home plot, such portion shall be utilized.

If property normally produces income, but produced little or no income during the past year, decision as to whether the property is producing reasonable income shall be based on the average net income during the past five years.

If real property is utilized by renting it, the charge for rental shall be consistent with the rental value of similar property in the community.

C. Time Limit for Utilization

The applicant or recipient shall be given a reasonable period in which to initiate his plan for utilization of his real property. This period shall expire three months from the date of the board of supervisors' action granting the application or three months from the date the recipient was advised that he must utilize his real property. If serious illness or other extenuating circumstances prevented the owner from proceeding with his plan for utilization the period shall be extended. Such extension shall be compatible with the conditions in the individual case. The specific circumstances which resulted in an extension of time shall be recorded in the case record.

Under no conditions shall an applicant be required to offer property for sale prior to the date on which the board of supervisors finds him eligible to receive aid.

D. Discontinuance Upon Failure to Utilize

Aid shall be discontinued when the county determines that the recipient has made no effort to utilize his real property by the expiration of a reasonable period as defined in Section C; or has made no effort to sell the property when utilization is not feasible, as indicated in Section E.

E. When Utilization Is Not Feasible

Utilization of real property shall not be considered to be feasible under the following circumstances:

1. The recipient knows of no way whereby he could make the property contribute toward his current needs, and the county determines that any effort on his part toward utilization of the property would be futile. The recipient, in order to qualify for continuing aid, shall offer the property for immediate sale unless the sale would be a useless act.

B-430 REAL PROPERTY BOUGHT OR SOLD UNDER MORTGAGE OR DEED OF TRUST

If real property is sold and a mortgage or deed of trust is taken as security for the unpaid balance of the sale price, title passes to the buyer (vendee). The assessed value of the property so sold is not considered as real property in determining the eligibility of the seller. The assessed value is a factor in determining the buyer's (vendee's) eligibility as he holds the title to the property. (See Sec. B-457, Determination of Value of Notes, Mortgages and Deeds of Trust.) (Walc 3075, 3460)

B-433 REAL PROPERTY LOST THROUGH FORECLOSURE

B-433

B-430

If property is lost through foreclosure, title passes to the new owner immediately upon sale of property under the decree of foreclosure. The former owner only has an equity for redemption purposes. The assessed value of the property is not considered in determining eligibility under these circumstances. (Walc 3075, 3460)

B-436 UTILIZATION OF REAL PROPERTY

B-436

ANB Only:

A. Requirement for Utilization

DB 426 Restated

Real property owned by an applicant or recipient shall be utilized to provide for his current needs. (This requirement does not apply to the separate real property of the spouse of an applicant or recipient.) He shall make the decision as to the way the property is to be utilized. The recording in the case record shall indicate the decision made.

If real property is owned with another person or persons, the applicant or recipient must attempt to utilize his share. If prevented from utilizing his share by the terms of the co-ownership or the desires of the other owners, the recipient shall not be considered ineligible.

B. Utilization Defined

Property is utilized when it provides the owner with shelter, food, or other maintenance items, is producing reasonable income, or in some other way is contributing toward the current needs of the owner.

Real property is utilized for shelter when it is the home of the applicant or recipient during all or a portion of the year. Real property normally occupied by the individual but not currently so used because of illness or temporary absence shall be considered the individual's home. If the home

B-436 (Continued)

B-436

Example 2: Suppose that an individual who lives in his own home plans to utilize his vacant lot by planting a garden. He plants a small garden and it contributes vegetables for his table (or flowers for his home) but the value is inconsequential other than providing some activity for the recipient which is therapeutic in nature. Is this utilization?

The plot surrounding the recipient's home suffices for his family vegetable or flower garden. The use of other real property for this purpose is not interpreted as utilization in that the property is not used to meet the current needs of the recipient.

Example 3: A recipient has a mining claim. The claim has produced no net income during the past several years although it has been worked during those seasons of the year when there was a water supply, weather permitting, etc.

Although the recipient's activity on his claim has therapeutic value for him, if it produces no net income by the expiration of one year, that fact plus the fact that it has produced no net income during the past several years, demonstrates that utilization is not feasible. The recipient must then offer the property for sale unless the real property is used as the home of the recipient during a part of the year, or sale of it would be a "useless act."

Example 4. A recipient is told that he must utilize his property. The county finds shortly thereafter that he has listed it for sale. Can it be assumed that the preliminary steps have been taken and that the man has decided that rental or some other form of utilization is not feasible?

If the recipient knows of no possible way in which the property can be utilized and the county is in agreement with him that further effort toward utilization would be futile, the property shall be offered for sale immediately (unless the sale would be a useless act). If the property is merely offered for sale by the recipient for the purpose of circumventing the utilization requirement, discontinuance is in order. Intent of the recipient, under these circumstances, must be carefully considered.

If the recipient decides to offer the property for sale without attempting to utilize it because he isn't able to take care of it any longer, there is a present market for it with possibility of sale at an advantageous figure, or there are other extenuating circumstances, immediate offer for sale would not be cause for discontinuance. In other words, all of the facts must be considered. Aid should be discontinued only when there is pretty clear indication that property which is capable of utilization is offered for sale merely for the purpose of circumventing the utilization requirement.

Example 5: In addition to his home a recipient owns 500 acres of rural land with a total assessed value of \$2000. The land is hilly country and is primarily pasture land. The recipient rents it for sheep pasture, receiving \$100 per year, but there is no net income because of the expense of building necessary fence, upkeep of existing fence, etc.

If the land is not producing any net income after the expense of taxes, fence building and repair, etc., have been met, it is not contributing toward the recipient's needs. If the rental charge for similar land is higher than the rental the recipient receives, and the rental charge for other similar land would result in some net income to him, he would be expected to make a higher rental charge for it. If \$100 represents reasonable rental, and there is no other possible plan for utilization, then further effort toward utilization would not be considered to be feasible. Under these circumstances the land must be offered for immediate sale.

Example 6: A recipient lives in his own home and in addition he owns an unimproved lot assessed at \$600 located in town. He cannot rent the lot, and there is no other plan whereby the lot can be made to contribute toward his needs. Must the property be offered for sale immediately?

The property must be offered for sale immediately unless such a sale would be a useless act.

Example 7: A recipient owns her home on six acres near town with a total assessed value of \$760.

A local dairyman uses the acreage for pasture of his stock. In return he provides the recipient with wood, chops it and keeps a supply of cut stove wood on her porch. The recipient is not able either to chop or carry it to her house. Is this utilization?

The property is being utilized in that the existing plan results in the recipient being provided with a maintenance item—wood. In addition, she receives a service which is necessary to her due to her inability to chop the wood or carry it to her house. Under these circumstances it is not necessary for her to change her utilization plan (or to sell the property, even though it may have considerable sale value).

(W&IC 3047, 3075)

B-436 (Continued)

B-436

Sale of the real property would be considered a "useless act" if the proceeds the recipient might reasonably expect to realize in a bonafide sale, together with his personal property resources would not exceed \$1200. Further, if the owner is married and the spouse with whom he is living is also a recipient of ANB the combined holdings of the couple, so determined, would not exceed \$2000.

The amount which could be realized in a bonafide sale is the estimated sale value as determined by realtors or others in a position to know the sale value of the property, less any encumbrances of record against the property.

2. The recipient has made unsuccessful efforts to rent or otherwise utilize his property and one year has expired since the application was granted by the board of supervisors. Unless the sale of the real property would be a "useless act", such recipient shall be required to offer the property for immediate sale. Exception: In the case of multiple dwellings when the recipient uses one unit of the property as a home, it need not be offered for sale.

The sale price shall be consistent with the value of similar property in the community as determined by realtors or others in a position to know the value of the property. The recipient shall remain eligible so long as he makes a continuous and bonafide effort to sell the property, i.e., continuously offers it for sale by posting the property or listing it for sale with one or more real estate agents, etc. In the absence of such effort, aid shall be discontinued.

F. Illustrative Principles on Utilization

The following instances, which may represent relatively typical case situations, illustrate how the principles on utilization should be applied:

Example 1. A recipient has land which has been rented for pasture for a good many years. He receives the going rental rate for the pasture land, which is useful for no other purpose, but the income has not been sufficient to pay the taxes. Is this reasonable income? Can it be said that the property is being utilized?

Property is utilized when it is producing reasonable income or in some other way is contributing toward the current needs of the recipient. If there is no net income the property is not contributing to the recipient's needs. Further, if there should be net income, the amount must meet the test of "reasonable" income. For instance, if the person had \$5 net income from a \$10 rental, but rental of like property would be in the neighborhood of \$25 a month, the income would not be considered to be "reasonable" income.

If the property normally produces some net income but is producing little or no income at present, decision as to whether it is producing reasonable income is to be determined on the basis of the average net income during the past five years. For example, the orchard which has produced net income in the past but is presently producing little or no crop because of damage by frost, blight, etc; the rental property which normally produces net income, but from which there is no present net income due to expense for a new roof or other major repair necessary to its maintenance as rental property.

B-445 OWNERSHIP OF PERSONAL PROPERTY

B-445

Therterm "owner" includes all persons who hold title either legal or equitable to personal property, regardless of its location. It also includes the vendor (i.e., the seller) and the vendee (i.e., the buyer) of personal property under a conditional sales contract.

Personal property is considered to be owned if it is held under any of the following conditions:

- 1. Clear of all indebtedness
- 2. Subject to a mortgage, or other obligation against it, or if it has been placed as collateral
- 3. Subject to purchase from another party under a conditional sales contract
- 4. Subject to sale to another party under a conditional sales contract
 - 5. In an undistributed estate when the property is in fact available prior to distribution of the estate
 - 6. In a trust when the property is in fact available in whole or in part.

Personal property may be owned:

- 1. As separate property
- 2. As community property
- 3. In joint tenancy
- 4. In tenancy in common
- 5. In a partnership
- 6. By a corporation

Personal property which is determined to be the separate property of the spouse shall not be considered in determining the value of the applicant's personal property, unless such spouse also applies for ANB. The full value of separate personal property is considered in determining eligibility of the owner.

(Section Continued on Next Page)

11-10

B-439 LIENS ON REAL PROPERTY

B-439

Aid granted shall not constitute a lien upon any property. If a lien, deed or mortgage is taken to secure GR reimbursement, it shall be so worded as to obtain satisfaction for GR alone. (Warc 3075, 3460, AGO NS 4473)

B-442 PERSONAL PROPERTY ELIGIBILITY REQUIREMENTS

B-442

- 1. ANB: Aid shall not be granted to any person who owns personal property, the value of which, less all encumbrances of record, exceeds \$1200.00. Aid shall not be granted to any married person living with a spouse who is also an applicant or recipient of ANB if the combined value of the personal property of both spouses, less all encumbrances of record, exceeds \$2000.00. (The \$2000 limitation is not applicable when the spouse is also an applicant or recipient of OAS. It applies only when such spouse "is also an applicant or recipient of aid under this chapter," (ANB), in accordance with the provisions of the W&I Code.) Combined personal property includes all separate personal property owned by either spouse and their community personal property.
- 2. APSB: Aid shall not be granted to any person who owns real or personal property or both, the county assessed value of which, less all encumbrances thereon of record, exceeds \$3500.00.

For eligibility for APSB only, personal property shall not include a policy or policies of life insurance on the life of the applicant or recipient which has or have been in effect at least 5 years prior to the date of application, if the net value of the policy or policies at maturity is in an amount not exceeding \$1000.00. The net cash surrender value of that portion of a life insurance policy or policies on the life of the applicant or recipient in effect five years or more which exceeds a net value at maturity of \$1,000.00 is considered. personal property.

Personal property shall not include interment plots as defined in Section 7022 of the Health and Safety Code, nor money placed in trust or insurance for funeral or interment expenses or similar purposes, nor \$ to any contract rights connected therewith if such money, insurance, or b

(See Sec. B-463, for examples on APSB insurance exemption.)

contract rights do not exceed \$500.00 in value.

The applicant's or recipient's sworn statement with regard to ownership of property is acceptable, except when information obtained from him is inconsistent or when conflicting information is received.

(W&IC 3047.2, 3047.21, 3075, 3447, 3447.1, 3460)

B-448 (Continued)

B-448

Example: A married couple living together own the following personal property.

\$900 market value of bonds (community property)
350 man's "paid-up" burial insurance (his separate property)
1300 bank account (her separate property)

The man applies for aid. The wife is neither an applicant or recipient. He is eligible because his one-half of the community property (\$450), and his separate property (\$350) does not exceed \$1200.

B. Married person living with a spouse who is an applicant for or recipient of ANB

Determination must be made under both (1) and (2) as to whether:

- (1) the value of such person's separate personal property and his share of community personal property exceeds \$1200 after encumbrances of record are deducted.
- (2) the value of the combined total personal property holdings of the applicant (recipient) and spouse exceeds \$2000 after encumbrances of record have been deducted.

Example: Married couple living together. Both apply. Determination established personal property holdings as follows:

\$50 bank account (his separate property) \$1200 value of bonds (community) \$700 bank account (her separate property)

Aid is granted for the man because (1) his separate property (\$50) plus his one-half of community property (\$600) does not exceed \$1200 and (2) all of the property owned by both (\$1950) does not exceed \$2000.

Although combined property of couple is not in excess of \$2000, the wife's application is denied because her separate property (\$700) and her share of community property (\$600) exceeds \$1200.

C. Eligibility of Spouses

If the spouse with whom a recipient is living applies for ANB, no decision shall be made in relation to the continued eligibility of the recipient until the determination of the separate and combined personal property of the couple has been completed.

If each of a couple is an applicant and/or recipient, and the personal property of each spouse is determined not to exceed \$1200, but their combined total personal property holdings exceed \$2000, aid shall be granted or continued to one spouse, denied or discontinued for the other spouse.

B-445 (Continued)

B-445

Each of a couple is presumed to own an equal interest in community personal property. Title to community property may be held jointly in the name of each of the couple, or it may be held in the name of either spouse. All property held in the name of the spouse of a married person is presumed to be community property, but the presumption may be refuted by evidence which establishes the property as separate property.

Frozen assets are thosewhich have become unavailable to the owner through no voluntary act on his part and which can not be obtained by any voluntary act on his part. An interest as evidenced by deposits, certificates of ownership, etc., in defunct banks, building and loan associations, or other organizations may be frozen in so far as obtaining funds from the particular bank, or other institution is concerned, but the interest may be saleable at a discount. Such saleable value represents personal property to be considered in determining eligibility.

All information pertaining to personal property shall be retained in the case record or recorded in the narrative. The recording of interviews or of examination of documents, when verification is necessary, shall include the source, the findings, the dates of steps in the investigation, and the names of those participating in the investigation. A complete explanation of any complicated situation regarding the property shall be included in the record. (See Sec. B-457, Types of Personal Property) (Walc 3047, 3075, 3447, 3460)

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B-448 LIMITATION ON PERSONAL PROPERTY

B-448

ANB Only

A. Person is single, divorced, widowed, or separated, or is living with a spouse who is not an applicant for or recipient of ANB.

The full market value of separate personal property owned by the individual and his share of community personal property shall be considered in determining his eligibility.

Personal property which is determined to be the separate property of a spouse who is not an applicant for or recipient of ANB shall not be considered in determining personal property holdings of the applicant or recipient.

B-457 TYPES OF PERSONAL PROPERTY

B-457

In ANB, the current market value of personal property shall be used in determining eligibility.

In APSB, the county assessed value of personal property is considered, except for cash, securities, and cash surrender value of insurance. If personal property is declared but is not listed on the local assessment rolls, it shall be referred to the county assessor to determine whether or not it is assessable, and if assessable, its assessed value. If the property is not assessable, the current market value shall be determined, and the ratio which the assessed valuation in the county bears to the market value shall be used.

It may be necessary to secure verification from appropriate sources to determine the value of certain items of property.

The following includes some of the more common types of personal property:

- 1. Cash and Bank Accounts—Cash on hand, in a bank account, or safe deposit box, in postal savings, on deposit with building and loan associations or otherwise held where it is payable on demand; the market value of an individual's interest in defunct banks, building and loan associations, etc.
- 2. <u>Life Insurance</u>—The cash surrender value of a policy or policies of insurance on the life of the applicant or recipient and the spouse. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either, except when the facts establish that the cash surrender value represents the separate property of the insured. (For exception in APSB, see Sec. B-442; also B-460, last paragraph.)

Cash received in a lump sum by the insured from the surrender or maturing of insurance policies, or cash received as beneficiary of a policy or policies carried by the deceased spouse. (See Item 9, this section, regarding funeral expenses.)

3. Burial Insurance—The face value, not to exceed \$500, of paid—up insurance when it is the type of policy which is payable only at death, i.e., has no cash surrender value during the life time of

(Section Continued on Next Page)

DB 413

DB 413 Restated B-448 (Continued)

B-448

The fact that aid can be granted to either one of the couple but not to both shall be discussed with them. The decision as to which one shall receive aid rests with the couple, but if it is to their advantage to grant to one rather than to the other, it shall be explained to them.

Example 1: Both of a married couple living together apply. Their only personal property is community property which totals \$2300 or \$1150 each. The couple receives net rent of \$20 a month or \$10 each. The wife has medical needs of \$10 a month. The couple is, therefore, in agreement that it is to their advantage to grant aid to the wife who is eligible to the maximum grant whereas the husband would receive only \$75. Her application is granted; his is denied.

Example 2: Man is receiving aid. His separate personal property totals \$1100. The wife applies and it is determined that she has \$1000 separate personal property. There is no community property. There is no advantage to them in granting to one or to the other. His aid continues, and the wife's application is denied.

(W&IC 3047.2, 3075)

B-451 PERSONAL PROPERTY OF MINOR CHILDREN

B-451

Personal property owned by minor children of an applicant or recipient shall not be considered in determining eligibility of the applicant or recipient. Insurance policies held by a minor child are considered to be the property of the child. The cash surrender value of such policies does not affect the parent's eligibility. Emancipation of the child has no bearing on the ownership of such insurance. (Walc 3075, 3460)

B-454 PERSONAL EFFECTS AS PERSONAL PROPERTY

B-454

In ANB, personal effects, such as clothing, furniture, household equipment, foodstuffs, fuel and personal jewelry, are not considered in determining eligibility.

In APSB, the assessed value of such property is considered. (W&IC 3047.21)

DB

B-457 (Continued)

B-457

Should it be necessary to determine the value of a motor vehicle the license fee for which is in excess of \$24, add to \$1205 that value in the foregoing table which is opposite the amount by which the vehicle license fee exceeds \$24.

The foregoing table cannot be used to determine the value of new automobiles purchased within the current year or the value of second-hand cars bought by recipients during the current year but previously registered in another state. Should it become necessary to determine the market value under either circumstance, contact the local office of the State Department of Motor Vehicles.

7. Stocks and Bonds--In ANB, the current market value of all stocks and bonds shall be used in determining eligibility.

U.S. savings bonds or other bonds or obligations of the U.S. registered in the name of one person payable on death to a named survivor, represent personal property of the registered owner during his lifetime. Upon the death of the registered owner, or co-owner, they become the property of the named survivor or surviving co-owner, unless federal laws and regulations governing the issuance thereof provide otherwise.

In APSB, if stocks and bonds are assessed, this value shall be used. If stocks and bonds are not assessed, the current market value shall be determined.

An estimate of the value of stocks and bonds may be secured from local bankers, brokers, or others qualified to make such estimates.

A person named as co-owner and having possession of a U.S. savings bond shall be presumed to be the owner thereof, unless such ownership is refuted. If the contention is made that all of the funds used to purchase the bond did not belong to the person, and that the bond was not a gift, that interest which is determined as belonging to the person shall be considered in determining eligibility. The person whose name appears on the bond as co-owner and who does not have possession of such bond shall be presumed not to own any part of the bond, unless such lack of ownership is refuted.

The current market value of United States Savings Bonds (Series A to E, inclusive) increases according to the table of values on the back of the bonds. Redemption values increase on the anniversary dates which fall at six month intervals following the first of the month in which the bond was originally issued. Redemption values for several denominations of Series E bonds are listed in the following table:

(Section Continued on Next Page)

143-55 Restate

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B-457

B-457 (Continued)

the insured. (Such burial insurance is considered the separate property of the insured.) No value shall be placed on burial insurance if premium payments are required, or as a condition to payment of a specified sum upon death, the insured must remain a member in good standing in a lodge, union or other organization with which he is insured. Such burial insurance is not "paid-up" insurance. (For exception in APSB, see Sec. B-442.)

- 4. Burial Trust or Similar Funds—The amount of funds placed in a burial trust or any similar fund earmarked for burial purpose. (For exception in APSB, see Sec. B-442.)
- 5. Interment Plot--Space intended to be used for interment purposes of the individual, whether a plot in a cemetery, a crypt, vault, etc. Such interment plot shall be considered to have a value of \$50 irrespective of the fact that the purchase price may have exceeded this amount. (For exception in APSB, see Sec. B-442.)
- 6. Motor Vehicles—The value of automobiles, trucks, motorcycles, etc., owned by applicants or recipients. The value as determined from the license fee recorded on the State Motor Vehicle Department registration card shall be used.

The registration card issued by the Motor Vehicle Department must be carried in every motor vehicle which is taxed by that department. On the registration card (white slip) for passenger cars is recorded the registration fee (\$6.00), and the vehicle license fee which varies in accordance with the value. The amount of the vehicle license fee appears in the space marked "V.L.F. Fee" on the second line above the space provided for the signature of the legal owner.

The registration card for trucks shows the registration fee, the truck weight fee, and the vehicle license fee. Use only that amount which is recorded in the space marked "V.L.F. Fee."

A schedule of the vehicle license fees and the values which they represent follows:

V+L.F.	VALUE OF VEHICLE	V.L.F.	VALUE OF VEHICLE
\$ 1.00	\$ 37.00	\$13.00	\$ 650.00
2.00	105.00	14.00	695.00
3.00	150.00	15.00	755.00
4.00	200.00	16.00	805.00
5.00	250.00	17.00	850.00
6.00	295.00	18.00	905.00
7.00	355.00	19.00	950.00
8.00	405.00	20.00	1000.00
9.00	450.00	21.00	1050.00
10.00	505.00	22.00	1095.00
11.00	550.00	23.00	1155.00
12.00	600.00	24.00	1205.00

B-457 (Continued)

B-457

145-10

9. Inheritance and Gifts--If the recipient receives personal property through the death of the spouse, or is the beneficiary of insurance of a spouse, such property or funds may be considered as being encumbered or charged with the funeral expenses of the deceased. Only the net value, computed after deduction of funeral expenses, shall be considered in determining eligibility. (CC654; AGO NS 4769)

134-30 145-05 estated The assessed value of real property or the market value of personal property acquired as a gift or through inheritance shall be considered. (In APSB, the county assessed value is considered, except for cash, securities, and cash surrender value of insurance.) A gift is the separate property of the person who received it. (See Secs. B-536, B±542, B-544 on Gifts.)

- 10. Lump Sums Received from the Following Sources:
 - a. OASI lump sum death payments received as spouse of an insured worker.
 - b. Refunds from income tax payments and from excess premium payments (special dividend) on National Service Life Insurance.
 - c. Nonrecurrent lump sum payments received by the recipient and/or his spouse from retirement or pension systems of which he or she was a former member; e.g., State Employees Retirement System, Federal Employees Retirement Fund under the U. S. Civil Service Commission, retirement plans of private corporations, etc. (See Sec. B-572, Income from Certain Government Sources.)
- ll. Conversion of Property—Real property may be converted to personal property, and vice versa, without causing ineligibility provided the real or personal property received, together with other real or personal property holdings, are not in excess of the maximum permitted.

In ANB, if the individual sells real property (title passing to the buyer) and plans to utilize the proceeds received from such sale to purchase a home for his own occupancy, the proceeds from such sale represent real property until the purchase is made, or the expiration of six months from the time of receipt of the proceeds, whichever is earlier. The county assessed value of property sold shall be used in determining real property value of proceeds from sale of the home.

If a home is purchased within a six month period, and the cost of the home is less than the proceeds received from sale of real property, the balance shall be considered personal property as of the first of the following month. If the recipient must make immediate repairs on the purchased property, allowance for the cost of such repairs shall be made when determining whether the cost of the home is less than the proceeds received from the sale.

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DB 397 DB 413 New

> 46-00 stated

DB 420

B-457 (Continued)

SERIES E WAR BONDS

Year after month		4		
of issuance	\$25	\$50		\$100
1/2	\$18.75	\$37.50		\$75.00
1/21	18.75	37.50	4	75.00
1 ,1 1/2	18.87	37.75		75.50
1 1/22	19.00	38.00		76.00
22 1/2	19.12	38.25		76.50
2 1/23	19.25	38.50		77.00
33 1/2	19.50	39.00		78.00
3 1/2-4	. 19.75	39.50		79.00
44 1/2	20.00	40.00		80.00
4 1/25	20.25	40.50		81.00
55 1/2	20.50	41.00	l.	82.00
5 1/26	20.75	41.50	,	83.00
66 1/2	21.00	42.00		84.00
6 1/27	21.50	43.00		86.00
77 1/2	22.00	44.00		88.00
7 1/28	22.50	45.00		90.00
88 1/2	23.00	46.00		
8 1/29	23.50	47.00		92.00
99 1/2	24.00	48.00		94.00
9 1/210	24.50	49.00		96.00
10	25.00	50.00		98.00

Example: A \$25 Series E Bond purchased June 24, 1942, is worth \$18.75 through May 31, 1943.

On June 1, 1943 (the first day of the anniversary month), the value increases to \$18.87, on December 1, 1943, to \$19.00, on June 1, 1944, to \$19.12, etc., according to the values given on the back of the bond.

8. Judgments and Compensation—A lump sum received as the result of compensation laws or in payment of a punitive judgment granted because of damages sustained by either the person or property of the applicant or recipient represents personal property. (If weekly or other periodic payments are received as benefits under the provision of compensation laws, such payments represent income.) A cash settlement accepted in lieu of a judgment is considered personal property.

The value of a judgment which has not been executed shall be considered in determining eligibility under personal property requirements. If the judgment is against a solvent corporation, the value of the judgment shall be considered to be equal to the amount of the judgment. If the judgment is against someone other than a solvent corporation, the county shall determine the ability of the judgment debtor to pay.

If the judgment cannot be executed because the debtor or his property cannot be located, or the judgment creditor has the judgment vacated, the value of the judgment shall not be considered.

If a judgment is the subject of an action brought by the judgment debtor in a higher court to vacate the judgment, and the judgment creditor is prohibited from executing the judgment, that portion of the value of the judgment remaining unsatisfied shall not be considered in determining eligibility while court action is pending. (See Sec. B-532, Definition of Income.)

(Section Continued on Next Page)

B-457 (Continued)

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143-95, Restated Glossary

144-08 Restated

- 15. Leases—Leases for a term of years are personal property. Exception:
 A lease is real property when it is for a period of not less than
 10 years and the leased premises are used as a place of residence
 for the lessee. If houses, cabins, etc., are placed upon leased
 land with the provision in the lease that they remain the property
 of the lessee, such holdings represent personal property, if the
 lease is personal property; real property if the lease is real
 property. In general, if the period of the lease is not specified,
 it is presumed to be one year.
- 16. Conditional Sales Contracts -- (See Sec. B-466)
- 17. Undistributed Estates—An heir's available interest in an undistributed estate. In determining the value of the inheritance, if any, which is available before distribution, consideration should be given to known indebtedness and to an estimate of the administrative costs exclusive of inheritance taxes. This estimate of administrative expense (exclusive of inheritance tax) may be deducted from the appraised value as filed with the probate court in determining the net amount of personal property available prior to distribution.

When two or more heirs have an undivided interest in an undistributed estate which is in fact available prior to distribution, each is considered to have an interest in proportion to the number of known heirs.

18. Trust Funds—An interest in the corpus of a trust only to the extent that the property is in fact available. If ownership of the trust is dependent upon the occurrence of a certain event, such as the individual attaining the age of 21 years, such trust is not considered his property until the stipulated event occurs. (AGC NS 4769) (Walc 3047, 3047.2, 3047.5, 3075, 3447, 3447.3, 3460)

B-460 DEFINITIONS OF INSURANCE TERMS

B-460

Net value at date of maturity is determined by adding the amount of paidwith up additions, if any, to the face value of the policy, and subtracting the amount
of any loans made by the company against that policy.

Date of maturity is the date on which the net value at maturity becomes due and payable. Most insurance policies do not mature until the death of the insured. A "20 or 30 pay" life insurance policy normally matures upon the death of the insured and not with the completion of the premium payments or at the end of any specified period of time. The net maturity value of an endowment policy

146-00

B-457 (Continued)

The plan for the use of the proceeds shall be ascertained when the sale becomes known. The plan as reported by the individual shall be recorded in the case record.

In APSB, proceeds received by a recipient from involuntary conversion of real property shall be considered real property for a period of one year from date of receipt. In order that such funds can be considered as real rather than personal property during the one year period there must be evidence that the sale was involuntary. (If there is any question that a particular action was involuntary, the matter should be referred to the county's legal advisor.) Any of the proceeds remaining at the termination of the one year period shall be considered as personal property in determining eligibility to continued aid.

The value of any increment (interest and/or increase) accruing from the converted property shall be considered in the same manner as other income or property.

- 12. Notes, Mortgages and Deeds of Trust—The value of notes, mortgages and deeds of trust, i.e., the amount which could be realized if such instruments were offered for quick sale, shall be ascertained. An estimate of their value may be secured from local bankers, realtors, loan companies or others qualified to make such estimates, except when the face value or amount still due, together with all other personal property are within the allowable maximum. Two or more estimates should be secured if the first estimate of the total personal property holdings is slightly below or above the maximum allowed. Additional estimates should also be secured if the first estimate appears to be unrealistic in light of the factors affecting current market value.
- Business Enterprise—The value of an individual's interest in personal property as represented by the stock on hand, fixtures and equipment, and the "accounts receivable" of a commercial or other business enterprise. Accounts due from customers as shown on the books of a business which are unsecured by notes, drafts, etc., i.e., "accounts receivable", to be of value must be valid and collectible. The value of "accounts receivable" will vary with the age of the accounts, the credit of the debtors and the regularity with which payments have been made. A representative of a collection agency, a retail credit association or other organization familiar with collections may be of assistance in estimating the value of "accounts receivable."
- 14. Value of Farm Equipment, Live Stock and Fowl—The value of farm machinery and equipment, such as tractors, cultivators, etc., and live stock and fowl. An estimate of their value may be secured from county agricultural agents, the Farm Security Administration, the Federal Land Bank, firms or individuals qualified to estimate the resale value of such holdings.

(Section Continued on Next Page)

B-463

Example:

Example: A single recipient owns a policy of insurance as follows:

Issued	Face Value	Loan	Net Value at Maturity	Net Cash Surrender Value
1/15/25	\$2,000	\$500	\$1,500	\$900

The first \$1,000 of the net value at maturity is exempt from consideration. The cash surrender value of that portion which exceeds \$1,000 constitutes personal property. The personal property value of the insurance is

Example: A single applicant owns insurance policies as follows:

Policy	Issued	Face Value	Loan	Net Value at Maturity
A	6/5/39 5/3/33 6/15/32	\$500 \$900 \$200	\$100	\$500 \$800 \$200 \$1,500

The net maturity value of policies B and C is \$1,000. Since each is over five years old, these policies are not considered in determining eligibility, and is not necessary to ascertain the cash surrender value of them. The cash surrender value of policy A must be ascertained and included with the value of other personal property.

If total insurance holdings consisting of a number of policies which have been in effect five years or more have a net maturity value in excess of \$1,000, that portion of the insurance to be eliminated from consideration as personal property may be any combination of such policies which best operates to the advantage of the individual.

If a policy or policies, previously not exempt, attain the age of five years, they automatically revert into the exempt group, provided that the total of all exempt insurance does not exceed a net value at maturity of \$1,000.

In the case of a married couple, each is considered to have a one-half interest in the net cash surrender value of policies carried by either. Insurance carried by an eligible or ineligible spouse which falls within the exemption shall not be considered in determining eligibility of applicant.

An insurance policy which has no cash surrender value is not an available resource for the support of the insured, and has no effect upon his personal property status.

(WEIC 3047, 3075, 3447, 3460)

B-460 (Continued)

B-460

becomes payable at the expiration of a specified period, i.e., 20 years in the case of a 20-year endowment. Upon reaching the maturity date, the net maturity value of the policy becomes personal property to be considered in determining eligibility. The fact that the insured elects to leave the funds representing the maturity value of the endowment policy on deposit with the company does not alter this situation.

Some insurance policies specifically provide for cash selective age benefit payments at a certain age upon surrender of the insurance certificate. The amount of the cash selective benefit is always less than the face value of the policy. If the insured elects to accept the cash selective age benefit, surrendering his policy, the insurance matures at that time. If the insured lets the insurance continue as a life policy, such a policy does not mature until the death of the insured.

Current net cash surrender value is determined by subtracting from the cash surrender value of the policy or policies the amount of any loans made by the company against that policy or policies, and unpaid interest thereon.

Date of policy is the date on which the policy was issued. This date shall be considered in determining the age of the policy. If a new or adjusted policy is issued in lieu of another, and the original policy gave the insured the option of converting it, the converted policy is treated as a continuation of the original, and the date of issuance of the original policy is considered. A new policy issued not by reason of any rights granted in the original policy, but as a new and unrelated contract, is considered to have been in existence only from the date the policy was issued.

Annuities usually are irrevocable and have no cash or loan value. Where annuities have a cash surrender value, this value shall be considered as personal property. (See Sec. B-463, Exempt and Non-exempt Insurance in APSB.)

Paid-up additions to the policy may be purchased with the dividends earned by the policy according to an option given to the insured by some companies. If accumulated dividends have been converted into paid-up additions, the amount of the additions must be considered in determining the net value of the policy at maturity. If the dividends are not used to purchase additions to the policy, but remain with the company where they are available to the individual upon demand, the amount of such dividends represents personal property. (W&IC 3047, 3075, 3447, 3460)

B-463 EXEMPT AND NON-EXEMPT INSURANCE APSB ONLY

B-463

Personal property shall not include a policy or policies of insurance which has or have been in effect at least five years if the net value of the policy or policies at maturity is in an amount not exceeding \$1,000. If the net value at maturity of such insurance policy or policies exceeds \$1,000, only that portion of the insurance which exceeds a net maturity value of \$1,000 shall be considered in determining the value of personal property holdings.

B-475 (Continued)

B-475

considered in determining his eligibility, The buyer's equity is the assessed value less the unpaid balance on the purchase price.

If real property is sold under contract of sale, the seller's equity in the property (which decreases as the buyer makes payments on the property) shall be considered in determining his eligibility. The seller's equity is the assessed value less the total amount paid on the principal (excluding interest). (AGO NS 704, NS 778, NS 2387, NS 4943, 47/307)

B. Personal Property

If personal property is being purchased on a conditional sales contract, the market value of the purchaser's equity in the article shall be considered in determining eligibility for ANB. In APSB, the assessed value of the purchaser's equity in such articles shall be considered.

In ANB, the market value of the purchaser's equity represents the difference between the current market value of the goods being purchased and the g remainder due on the contract. There will be no equity when the remainder due exceeds the current market value. In APSB, the purchaser's equity is the difference between the assessed valuation and the amount due on the contract. If the balance due on the contract is greater than the assessed valuation, there is no equity.

In ANB, if personal property is sold on a conditional sales contract, the market value of the seller's equity in the article shall be considered in determining eligibility. In APSB, the assessed value of the seller's equity in such articles shall be considered.

In ANB, the market value of the seller's equity is the current market value of the goods being sold less the total amount paid on the purchase price (excluding interest). If the amount paid on the purchase price exceeds the of current market value, there is no equity.

In APSB, the seller's equity is the assessed value of the article less the amount paid on the purchase price. If the amount paid on the purchase price exceeds the assessed value, there is no equity.

In the absence of information to the contrary, it is the presumption that payments are being made regularly in accordance with the terms of the contract of sale. (W&IC 3075, 3460; AGO 47/307)

B-466 EFFECT OF LOANS AGAINST INSURANCE

An applicant who was previously adjudged ineligible (or would have been ineligible had application been made), because of the cash surrender value of life insurance, may subsequently borrow on such insurance without disqualifying himself for future aid. A loan may have been made against the policy or policies of insurance for the purpose of immediate maintenance of the insured and/or his dependents, or adjustments may have been made for some other purpose than to qualify for aid. Under these circumstances, eligibility is not impaired, provided personal property holdings are within the maximum.

B-469 INSURANCE ADJUSTMENTS

B-469

B-466

If an insurance adjustment is necessary, that adjustment which will best conserve the assets of the insured shall be made. The Life Insurance Adjustment Bureau, 450 Seventh Ave., New York, N. Y., renders service to recognized social agencies in connection with adjustment of insurance issued by the Metropolitan Life Insurance Company, Prudential Insurance Company of America and the John Hancock Mutual Life Insurance Company. Adjustment problems in connection with other types of insurance should be taken up directly with the company concerned. (WAIC 3075, 3460)

B-472 ACQUISITION OF REAL AND/OR PERSONAL PROPERTY

B-472

Real and/or personal property may be acquired by purchase or exchange without affecting eligibility, provided the total assessed value of all real property, or the total market value of all personal property does not exceed the maximum allowed. In APSB, the county assessed value of real and personal property is considered.

If a recipient or spouse purchases property, the terms of the purchase and plan of payment shall be ascertained. If it does not appear that the payments can be met out of the known resources and the grant, the possibility of unknown assets or income should be explored.

The use of personal property, even in excess of the maximum allowed, for purchase of real property does not result in ineligibility if the county assessed value thereof, together with other real property, is not in excess of the maximum allowed. (Walc 3047, 3075, 3447, 3460)

B-475 REAL OR PERSONAL PROPERTY BOUGHT OR SOLD UNDER CONTRACT OF SALE (Title Remaining with the Seller)

B-475

A. Real Property

If real property is bought under contract of sale, the buyer's equity in the property (which increases as he makes payments on the property) shall be

(Section Continued on Next Page)

B-481 (Continued)

B-481

If property is confiscated, i.e., seized by a government for public use, its value is not considered when determining eligibility; however, the possibility of indemnity should be explored. Assets which are impounded, i.e., seized and held in custody of the law presumably for safe keeping, represent personal property to be considered in determining eligibility.

(W&IC 3047, 3075, 3447, 3460; AGO NS 4043)

B-484 ENCUMBRANCES ON REAL AND/OR PERSONAL PROPERTY

B-484

Encumbrances of record shall be deducted from the county assessed value of real property and from the current market value of personal property holdings in determining eligibility for ANB. (In APSB, the county assessed value of such holdings is considered when determining eligibility.) Encumbrances include any debt for which the property is security but to be deductible, the encumbrance shall be a written record, the discharge of which requires the payment of money.

Some of the more common types of real property encumbrances are: mortgages, deeds of trust, delinquent tax liens, judgment liens, loans, mechanics' liens, builders' liens, assessments, attachments, etc. Personal property encumbrances may include chattel mortgages, loans, (including those for which stocks or bonds are collateral); attachments for debts, taxes, etc.; pledges, etc.

The existence, amount, and duration of all encumbrances to be deducted from the assessed value of real property and current market value of personal property, shall be determined. A search of the county recorder's records may be necessary for determination of an encumbrance. However, this information can usually be obtained by inspection of the document in the owner's possession or by interview or correspondence with the holder of the mortgate or note.

If the market value in ANB or the county assessed value in APSB of all personal property considered in determining eligibility is well within the maximum, no determination of encumbrances need be made. The total value, without regard to encumbrances, shall be stated in the case record, but encumbrances reported by the applicant or recipient shall be noted. Even though the assessed value of real property is within the maximum, the amount of any encumbrances on the property shall be determined and recorded.

(W&IC 3047, 3075, 3447, 3460, AGO NS 5134)

B-490 TRANSFER OF PROPERTY TO QUALIFY FOR AID

B-490

No person is eligible for aid if a voluntary transfer or assignment of real or personal property has been made by him for the purpose of reducing the valuation of remaining holdings within the statutory maximum. (In ANB, the assessed valuation of real property, and in APSB, the assessed valuation of all property shall be considered.)

B-478 REAL OR PERSONAL PROPERTY IN ESCROW

While real property is held in escrow, title to property does not pass to the purchaser but remains with the seller.

Funds held in an escrow account, which can be revoked only upon the consent of all parties involved, are not available for use and shall be disregarded in determining eligibility. Pending actual conveyance of title to the purchaser, funds placed in escrow by him for the purchase of a specific piece of property do not affect eligibility of either the purchaser or the seller. If all conditions of the sale, or other conditions which the escrow guarantees have been met, and the escrow is completed, the property becomes available to the individual and shall be considered in determining eligibility.

(W&IC 3075, 3460; AGO NS 5149)

B-481 REAL AND/OR PERSONAL PROPERTY OUTSIDE U. S.

B-481

B-478

The assessed value of real property located outside the United States, shall be considered on the basis of the rate of exchange in American dollars, regardless of the manner by which other units of government determine the assessed value of such property. If, e.g., the Mexican Consul advised that property in Mexico was assessed at 1000 pesos and rate of exchange was 5 pesos to 1 dollar, the assessed value of the property would be \$200.

To obtain information regarding real or personal property located outside the United States, various sources are used. If no language barrier exists, the county may correspond with the unit of government or public official concerned. If a language barrier exists, inquiry is generally directed to an American Consul in the country concerned. The nearest representative of the other country may also be consulted.

e Restated ul lso

The value of real or personal property owned in another country shall be considered in determining eligibility. The current rate of exchange shall be used to convert foreign values into U. S. monetary units. For example, if the current market value of certain Mexican bonds is 1,000 pesos and the rate of exchange is 5 pesos to 1 dollar the value to be considered is \$200.

During a period of hostilities, continued ownership of real or personal property located in countries actively at war, or in conquered or occupied areas, it is impossible to obtain reasonably positive evidence of eligibility or ineligibility with respect to property located in such countries, it is the presumption that continued ownership is in doubt and that such property has no present value in determining eligibility. Determination of such holdings need not be pursued. Upon cessation of hostilities, determination shall be made through the usual sources available in ascertaining the value of real or personal property in foreign countries, aid to continue during the determination provided eligibility otherwise exists.

B-490 (Continued)

B-490

If it is not possible to secure an estimate of the market value of real property, use that figure which represents double the assessed value at the time the transfer was made.

The income a person receives during the period of ineligibility due to transfer of property in order to qualify for aid shall not be used to extend that period. Aid paid to a recipient during the period of ineligibility shall not be considered in determining the period of ineligibility. Under such circumstances there may exist a right to request repayment of aid received while ineligible. (See Sec. B-672, Right to Request Repayment of Aid.)

D. Clearance with SDSW on Doubtful Cases

If there is any question as to whether property was transferred to qualify for aid, or as to period of ineligibility, the facts may be submitted to SDSW for decision.

(W&IC 3047, 3075, 3447, 3460; 20 (dal. (2d) 865)

B-493 ASSIGNMENT OF REAL AND/OR PERSONAL PROPERTY TO NON-PROFIT INSTITUTIONS

B-493

An inmate of a fraternal, benevolent or other nonprofit institution who assigns or has in the past assigned to such home or institution personal or real property is no longer owner of title to such property. In the absence of a life-care contract, the inmate may own a valuable right or interest which represents personal property regardless of whether the property assigned was personal or real. If the applicant is otherwise eligible for aid, the present value of such right or interest shall be considered in determining eligibility. (See Sec. B-524, Eligibility of Residents of Private Institutions.) (Walc 3047, 3075, 3447, 3460; AGO NS 5220)

30

B-490 (Continued)

B-490

No person is eligible for aid if a voluntary transfer or assignment of real property has been made by him in order to avoid utilization of the resource. (See Sec. B-436, Utilization of Real Property.)

If title passed by delivery of the deed more than two years preceding the date of application, it is the presumption, which may be refuted, that the transfer of title was made in good faith and not for the purpose of qualifying for aid or for a greater amount of aid. (See Sec. B-424, Life Estate Interest.)

A. Transfer for Life Care

Unless there is evidence that the contract is not enforceable, a transfer of personal property, subject to the condition that the donee will provide full support for the donor for the remainder of his life, renders the donor ineligible as he has entered into a contract for life care. If an enforceable contract of this nature provides for less than full support, the amount provided shall be considered income.

B. Determination of Reasons for Voluntary Transfer

Transfer of property involves the determination of intent. Among the factors to be taken into consideration are:

- 1. Date of transfer.
- 2. Consideration received.
- 3. Value of the property, including the amount of any mortgage, delinquent taxes, or other assessments and encumbrances which affect the value of the grantor's equity.
- 4. Reason for the transfer.
- 5. Amount of income derived from the property.
- 6. Physical ability of the grantor to continue the operation that produced the income; efforts toward lease or sale of property in the event of inability to continue its operation.
- 7. Person in receipt of the income prior and subsequent to the transfer.
- 8. Threat of foreclosure, if any.
- 9. Ability of grantor to meet mortgage or assessment payments.

C. Duration of Ineligibility

If a person becomes ineligible because of transfer of property to qualify for aid or to avoid utilization of the resource, the period of ineligibility shall begin the first day of the month following that in which such property was transferred. The duration of the period of ineligibility shall be based upon the period that a reasonable return for the grantor's equity in the property, had it been sold, would have supported the grantor and those dependent upon him. The support of an individual without dependents shall be figured at \$150 a month, and for each dependent the sum of \$50 a month shall be added. The period of ineligibility in months is determined by dividing the estimated net market value of the transferred property at the time the transfer occurred by the appropriate monthly support allowance. The result is adjusted to the nearest whole number.

B-509 INSTITUTIONS NOT CONSIDERED PUBLIC INSTITUTIONS

B-509

Institutions which are not considered public institutions for purposes of aid include:

- 1. A shop for the blind maintained by the state which does not provide board and room to blind employes;
- 2. Public high schools, University of California and any other institutions of higher learning in the state. (WAIC 3044, 3075, 3444, 3460)

B-512 ELIGIBILITY OF PUBLIC INSTITUTION INMATES

B-512

An inmate of a public institution may apply for aid. If otherwise eligible, gaid shall be granted from the first of the month in which the determination is made that he is eligible.

Not more than one warrant may be delivered to the applicant at the public institution. The applicant must move from the institution as soon as possible after receiving his first warrant.

An inmate of a federal hospital or home located in this state, and which is not supported in whole or in part by the state or any of its political subdivisions, may apply for and receive aid while an inmate. (AGO NS572)

A person confined in a public institution of a custodial or correctional character is not eligible to receive aid, and aid shall be discontinued as of the last day of the month in which a recipient enters such institution. If aid is restored following discontinuance because of confinement in a public hospital or in a public institution of a custodial or correctional character, aid may be restored for the balance of the month during which he was not confined in such institution, provided he is otherwise eligible. (See Sec. B-515, Eligibility During Hospitalization; for ANB, see Sec. B-518, Institutional Subvention for Hospital or Infirmary Care.)

Certification of Payment after Release of Inmate from County Institution

As evidence that an applicant whose application was granted while an inmate of a public institution and who received his first warrant while in the institution, ceased to be an inmate following receipt of that warrant, a Certificate of Delivery of Payment of Aid, Form AB 231, relating to the warrant for the second month shall be completed and filed in the case record. The county official or other person delivering the warrant certifies on AB 231 to the day the applicant left the institution and the date the warrant was delivered.

B-503

B-503 INSTITUTIONS -GENERAL

The Aid to the Blind Program has been established primarily to provide care for a person in his own home, as the preservation of satisfactory home and family life is one of the major goals of a welfare program. Aid shall be granted to a person in his own or some other suitable home of his own choosing, in preference to placing him in an institution. Institutional care, however, may sometimes be necessary. Some physical and mental illnesses may be cared for best in institutions. When constant care is required, few homes can adequately meet the need. The right of a person to make his own living arrangements includes his right to live in a boarding home or private institution of his own choice.

Eligibility is not dependent upon the licensing or approval of the boarding home or private institution in which an applicant or recipient is living. (Walc 3044.5, 3075, 3460)

B-506 INSTITUTIONS DEFINITIONS

B-506

The term "public institution" may be considered as including a place of residence which affords shelter or care to two or more persons, and is managed in whole or in part by or through any public instrumentality, official, or employee acting in an official capacity; or a place of residence, which, by reason of the circumstances of its origin and charter or maintenance from public funds, may properly be termed a public institution; or a place of residence in which collective shelter or care at a single or lump sum contract price is afforded to two or more persons by agreement with the State or any of its political subdivisions for a consideration of money or money's worth.

A county institution is one established and maintained by a county for the purpose of rendering medical or surgical care to the sick or wounded or where the infirm are given shelter and maintenance. County institution includes a private hospital which, pursuant to contract with the county accepts patients for medical, hospital, or infirmary care at county expense.

A private institution is defined as a facility managed and controlled by an association or corporation or by an individual for the purpose of giving shelter and/or care to groups of people, and which is not supported from public funds. A private institution may be either commercial non-profit, fraternal or benevolent. (Walc 3044.1, 3075, 3460)

Foreward Clarification

161-0

165-05

B-515 (Continued)

B-515

C. State Hospital

Court commitment to a state institution renders a person ineligible for aid. Aid shall be discontinued as of the last day of the month in which the recipient enters the institution. (See Sec. B-512, Eligibility of Public Institution Immates.)

Aid may be continued for a period not exceeding two calendar months, for recipients who are admitted to a state hospital on a voluntary basis.

D. Required Statements for All Public Hospital Patients

In order to determine if federal participation may be claimed for the aid granted to a recipient who enters a public institution (see Sec. B-521, Recipients in Public Medical Institutions--Federal Reimbursement), it shall be necessary to secure a statement each month from the institution, specifying whether or not the recipient:

- (1) Is a "patient" in a "public medical institution" as defined in Sec. B-521.
- (2) Has a diagnosis of tuberculosis or psychosis
- (3) Is a patient in a public institution maintained for the purpose of treating persons suffering from tuberculosis or mental disease
- (4) Is an inmate of a public institution of a custodial or correctional character, or an inamte of a unit in a public medical institution in which unit only infirmary or custodial care is provided.

The statement from the public institution shall be filed in the case record or there shall be a cross reference to such information elsewhere in the county welfare office. (WAIC 3044, 3075, 3444, 3460)

B-518 INSTITUTIONAL SUBVENTION FOR HOSPITAL OR INFIRMARY CARE AND ONLY

B-518

Payment to the county for medical, hospital or infirmary care rendered a former recipient of ANB in a county institution at county expense may be made when all of the following conditions are met.

1. The individual was eligible for and was receiving aid on the date of admission.

(Section Continued on Next Page)

DB443 Restated

165-00 Restated

B-512

B-512 (Continued)

If aid is restored following discontinuance because the recipient entered a county public institution, Form AB 231 need not be completed but the Notice of Change, Form Bl 232, shall show the date the recipient left the institution. If Bl 232 restoring aid is prepared in advance on the basis of the anticipated date when he will leave the institution, Form AB 231 shall be completed as evidence that he left the institution on or prior to the effective date of restoration.

This procedure does not apply where a recipient enters a hospital for temporary medical care and aid is continued. Warrants shall be delivered to such recipients after admittance to the institution in accordance with the rules in Sec. B-515. (See Sec. B-651, Restoration of Aid.) (AGO NS4700) (W&IC 3044, 3044.5, 3075, 3084, 3444, 3460)

B-515 ELIGIBILITY DURING HOSPITALIZATION

B-515

A. Public Hospital

A recipient entering a public hospital for medical or surgical care is eligible for aid for a period not exceeding two calendar months. If two calendar months have elapsed since the recipient was admitted, aid shall be discontinued. (See Sec. B-521, Recipients in Public Medical Institutions—Federal Reimbursement.)

164-10 Restated

If the recipient enters the hospital on the first day of the month, the aid shall be discontinued effective as of the last day of the next calendar month.

(AGO N54700)

Example 1: A recipient is admitted to county hospital on July 1. Aid is payable for July and August but is not payable for September, because on September 1, he had already been in the hospital for two calendar months. Aid shall be discontinued August 31.

Example 2: A recipient is admitted to county hospital on July 5. Aid is payable for August and for September because on the first of either month he had not been in the hospital for two calendar months. Aid is discontinued September 30.

Periods of temporary hospitalization may recur, but aid shall not be paid to a recipient who returned to a hospital immediately following a temporary period of hospitalization for the same ailment which was responsible for his former hospitalization, unless the release from and subsequent return to the hospital are in accord with the recommendation of a physician.

B. Private Hospital

A recipient who enters a private hospital is eligible to continue to receive aid while in the hospital. The two calendar month limitation does not apply to private hospital care. (See Sec. B-615, Medical Care Allowances.)

B-521 (Continued)

B-521

B44

2. The recipient does not have a diagnosis of tuberculosis or psychosis.

If on the first day of the month a recipient has the status of a patient in a public medical institution, federal participation is available in the payment for the full month even though the recipient may lose "patient" status during the month by transfer to a custodial unit. (Claiming for federal participation shall be discontinued as of the end of the month in which such transfer occurs.)

Claiming for federal participation shall be discontinued at the end of the month in which a recipient is admitted to:

- 1. A public institution of a custodial or correctional character.
- 2. A unit in a public medical institution in which only infirmary or custodial care is provided.

Definitions

A public medical institution as used in this section is one which:

- 1. Is maintained in whole or in part by or through any public instrumentality, official or employee, acting in an official capacity or, by reason of the circumstances of its origin and charter or maintenance from public funds, is a public institution. (It does not include a private institution which by agreement with a public instrumentality is offering care at a single or lump sum contract price.) (AGO 48/176.)
- 2. Is operated for the purpose of providing medical care, including nursing and convalescent care, and has the necessary professional personnel, equipment and facilities to meet the medical needs of patients on a continuing basis in accordance with accepted standards.
- 3. Is staffed by professional medical and professional nursing personnel who have clear and definite responsibilities to the institution in the provision of medical services to patients.

<u>Patient</u>: The following criteria shall be met in making the determination that a person is a "patient" in a public medical institution:

1. The person is in a public medical institution because of an illness for which he is receiving planned, continuing medical treatment including physician's services and nursing care, directed toward improvement in health; or is receiving medical treatment for an illness for which medical measures are required though improvement in health or recovery cannot be expected.

B-518 (Continued)

B-518

- 2. The individual has been continuously confined in the institution and two calendar months since date of admission have elapsed. (See Sec. B-515, Eligibility During Hospitalization.)
- 3. There is on file in the county the certification of the superintendent or other official of the institution that the former recipient received care in the institution during each month for which a claim is filed.

The state's payment for medical, hospital, or infirmary care rendered a former recipient of ANB in a county institution is \$35.20 per month, or portion of a month.

In all cases where payment to the county for institutional care is to be claimed, the county board of supervisors shall take action requesting such payment in the first month for which the claim is being made, if possible.

There may be overlapping of payment to the county for institutional care and payment of aid to the individual. If aid is restored to the recipient effective as of the date of release from the institution (either by automatic restoration or by action of the board of supervisors during the month of release), institutional subvention is payable for the full month.

If a former recipient for whose care institutional subvention is paid dies before the end of the particular month, institutional subvention is payable for the full month. (AGO NS5350)

Subvention shall be claimed by the county rendering the care irrespective of the former recipient's residence status, except when such care is being given under a contractual arrangement between the two counties in which case, the county paying for the care rendered shall claim. (Ward 3044.1, 3075)

RECIPIENTS IN PUBLIC MEDICAL INSTITUTIONS --B-521 FEDERAL REIMBURSEMENT

B-521

Federal reimbursement is available for payments made to a recipient in a public medical institution for the first two calendar months of confinement, provided the institution is not maintained solely for the purpose of treating persons suffering from tuberculosis or mental disease and:

1. The recipient is a "patient" in a "public medical institution," as defined in this section.

A resident of a home or institution maintained by any fraternal, benevolent or nonprofit organization is ineligible for aid if he is cared for under a life care contract.

Residents of fraternal, nonprofit and benevolent institutions who have a valid and enforceable contract for support are not in need. Persons who voluntarily cancel such a contract for the purpose of qualifying for aid are not eligible. Determination as to the reason for cancellation of the contract shall be made by the county. (See Sec. B-493, Assignment of Real and/or Personal Property to Non-Profit Institution.)

If investigation reveals that it is impossible for the institution to carry out its contract, aid shall be granted to residents otherwise eligible. (AGO NS906)

If the welfare of the individual requires a living plan other than that provided by continued residence in the institution, the cancellation of a contract is not considered to be for the purpose of qualifying for aid.

An applicant who has an insurance policy providing optional life care in an institution is not required to take up such option.

The payment of dues or assessments by a member, or on his behalf, which is used in whole or in part toward the maintenance of persons within the home or institution does not in itself entitle the member to receive care for life in the home or institution. The transfer of property to the home or institution as a condition of admittance does not in itself result in a contract for life care. The fact that the person has agreed or promised to pay for his maintenance in the event he receives a pension, bequest, device, or other inheritance is immaterial. In general, an agreement which specifies that the institution may terminate the rendering of care, with or without cause, does not constitute an agreement for life care. (AGO NS4353)

An investigation shall be made to determine if an inmate is legally entitled to receive care for life. This investigation shall consist of an examination of the by-laws of the institution and of the application or agreement between the inmate and the organization or other parties, such as the members of the organization. If the results of the investigation leave doubt as to the existence of a life care contract, the facts may be submitted to the SDSW for decision.

(Section Continued on Next Page)

B-521 (Continued)

2. The individual is free to leave at the conclusion of treatment, or at any other time upon his own decision.

A person is <u>not</u> a patient if he is in an institution rendering infirmary or custodial care and he does not receive continuing, planned medical care even though he has a disability which prevents him from maintaining himself outside an institution. The major factor which establishes whether or not a person is a "patient" is the individualization of medical care received in "patient" care as distinguished from congregate services.

(See Sec. B-515, Elibibility During Hospitalization.) (W&IC 3075, 3460, FSSA)

B-524 ELIGIBILITY OF RESIDENTS OF PRIVATE INSTITUTIONS

B-524

A resident of a home or institution maintained by any fraternal, benevolent or nonprofit organization is eligible for aid, provided the following conditions are met:

- 1. There is no contract obligating the home or institution to care for the inmate for life. (See Sec. B-527, Life Care Contracts)
- 2. The inmate is either obligated to pay the institution for the support provided, or the value of the support given without charge to the inmate is such that his full need is not met. If full support is not furnished by the institution and the inmate is otherwise eligible, aid shall be granted in an amount necessary to cover the portion of his need not furnished by the institution. (AGO NS5220)

Eligibility for admission to a fraternal home or any other home does not render a person ineligible for aid if he does not desire to avail himself of the privilege of entering such home.

It shall be determined whether the governing body of the institution has adopted a resolution making a bona fide request for payment for the support given in the institution. If such a resolution has been adopted, written notification of its requirement shall be given to the inmates, either collectively or individually, and such notification constitutes a request for payment for the support given. If payment is required, a copy of the resolution shall be on file in the county. (WAIG 3044.5, 3075, 3084, 3460, 3472; AGO NS3980)

163-00 Restated

163-35

Determination of Per Capita Cost in Private Non-Profit Institution

The SDSW makes financial studies of the per capita cost of all institutions coming within the scope of the ANB and APSB laws. Such a report shall be requested only when as a condition of admission the applicant transferred property to the institution in such amount that the value of the applicant's resultant interest together with other personal property exceeds the maximum permitted. (See Sec. B-493)

If the institution has not yet been studied by the SDSW, an estimate of the per capita cost, including a reasonable allowance for depreciation, should be secured from the institution. This tentative figure shall be used by the county pending determination of the per capita cost by the SDSW.

If an applicant or recipient is a resident of a private home or institution operated for profit, it is not necessary to determine the per capita cost of the institution. It is the presumption that the amount charged each resident for board and care in these homes represents the value of the commodities and services rendered to him. (WAIC 3044.5, 3075, 3460)

B-534 CASUAL INCOME AND INCONSEQUENTIAL RESOURCES

B-534

Income which is determined to be either casual income or an inconsequential resource shall not be considered in determining the amount of aid. Any portion remaining at the beginning of the month following receipt of such income shall be considered in determining the value of personal property holdings.

An evaluation shall be made in each case as to whether any particular ingreene appreciably contributes in meeting the continuing basic needs of the recipient to determine whether such income is, in fact, casual. In no instance may an arbitrary determination be made that income of any given amount or from any given source is casual.

The use of the net return from any resource available to the recipient shall be evaluated in terms of the continuing basic needs of such recipient to determine whether it is, in fact, inconsequential.

If a recipient's income is determined to be "casual income" or an "inconsequential resource" the case record shall show all of the facts which led to that conclusion. It is not necessary to report the receipt of the casual income to the SDSW. (Walt 3075, 3084, 3460)

B-536 SOURCES AND TYPES OF INCOME

B-536

Income may be derived from a number of sources including the following:

- Insurance, pensions, and other benefits; e.g., Unemployment Insurance Benefits, Disability Insurance Benefits, Workmen's Compensation, Old Age and Survivors Insurance, Servicemen's Allowances, allotments from inmates of penal institutions, payments from industrial concerns, unions or lodges, civil or military pensions, annuities, trust funds, etc. (Exception: a single payment of the entire benefit or award from retirement, pension, or compensation is considered personal property, not income.)
- 2. Rental of real property or rental of rooms.

(Section Continued on Next Page)

151-60 Restated Income, other than casual income, is that which is actually available (not potential income) and which is received with sufficient regularity to form a basis on which the recipient may with security plan the necessary expenditures for his maintenance. Income may be in cash or it may be in kind.

Community income of a married couple is generally derived from current earnings, or resulting from past employment (civil and military pensions, OASI, or regular payments received because of industrial or unemployment compensation laws, etc.) or from real and personal community property.

Separate income is that received from real or personal property representing the separate property of the owner. It also includes income resulting from employment or military service rendered prior to the present marriage, such as civil or military pensions except that if the marriage took place during the period the service was rendered, the income shall be considered community income. If spouses enter into an agreement, either oral or written, whereby the applicant or recipient relinquishes his interest in the spouse's earnings, the income of the spouse shall be considered separate income from the date such agreement was made. In the event it is determined that the agreement was made for the purpose of qualifying for aid or for a greater amount of aid, the income from the spouse's earnings shall be treated as the community income of the couple.

Net income means that amount which remains after allowing for all normal items of expense incident to its receipt.

Current income is that which is received in the current month or during the two months immediately preceding the current month. Regardless of the period over which it accrued it shall be considered income in the month received. (See Secs. B-540; B-542 on Exempt Income in ANB and APSB)

Casual income is income which is unpredictable as to amount and time of receipt, which is of short duration, and which is of negligible importance in meeting the continuing essential needs of the recipient.

Income in kind is a contribution other than cash which materially assists the recipient in meeting his recurring basic needs, such as free rent, free board and room, maintenance, etc.

A resource is a holding of either real or personal property. The value of the "use of resources" means the net return from the resource and not the value of any capital portion of it.

An inconsequential resource is the net return from a holding of either real or personal property, the use of which makes no appreciable contribution to the meeting of those continuing needs of the recipient which constitute the necessities of life. (Wall 3075, 3460)

53-80

ted.

B-538 (Continued)

B-538

Example 1: An ANB recipient, having a spouse receiving OAS, has earned income of \$125 a month. The ANE recipient has a continuing special need for medical treatment in the amount of \$15 a month. This \$15 a month required to meet the special need of the recipient, together with \$50 a month which is exempt from any consideration, is subtracted from the total income from earnings, leaving \$60 a month which the recipient may allocate toward meeting the needs of his QAS spouse. Since the spouse has no special needs, the \$60 would be income to be considered in her OAS grant.

If in the above example, the ANB recipient's total needs were \$130 a month, the first \$50 would be exempt; the next \$45 is allowed to meet the special needs of the ANB recipient; the remaining \$30 of the non-exempt income would be deducted from the spouse's total needs.

If neither the recipient of ANB nor his spouse who is a recipient of OAS, had any special needs, the \$125 earned income would be allocated as follows: \$50 exempt to the ANB recipient; the next \$50 may be allocated to the spouse; the balance of \$25 non-exempt income would be divided equally, thus resulting in non-exempt income of \$12.50 a month to the recipient of ANB and \$62.50 income to the spouse.

Example 2: See example 4 in Sec. B-540 for illustration of division of earnings with spouse not in receipt of OAS.

If an ineligible spouse has community income from current earnings, or resulting from past employment (civil and military pensions, OASI, or regular payments received because of industrial or unemployment compensation laws, etc.), he may retain an amount of such community income sufficient for the support of himself and/or minor children. After allowance is made for the needs of the ineligi-E ble spouse and minor children, the balance shall be allocated to the recipient. However, if the needs of the ineligible spouse and minor children amount to less than one-half of the net income, one-half of such income shall be allocated to the recipient.

Net income from real and personal community property shall be shared equally with the spouse whether eligible or ineligible.

If the recipient has separate income from any source, the total amount of such net income must be applied toward his own need and no portion may be allocated to the spouse whether eligible or ineligible.

If an ineligible spouse has separate income from any source no portion of such income may be arbitrarily considered as income to the recipient. The extent to which the applicant or recipient is actually in receipt of assistance from such spouse, either in cash or in kind, shall be determined on the basis of the Such spouse, of the factually received. (The pecuniary ability of the ineligible spouse whose income is his or her separate income, is determined in the same manner as the pecuniary ability of other responsible relatives as outlined in Sec. B-582.) (See Sec. B-532 for definition of separate income.)

B-536

- Interest or dividends on or rental of personal property. (See B-460, Definition of Insurance Terms.)
- 4. Sale of crops, increase of livestock, or other farm products.
- 5. Private agencies or individuals.
- 6. General relief.
- 7. Net income from wages, salaries and commissions.
- 8. Occupancy value.
- 9. Contributions from legally responsible relatives.
- 10. Contributions in kind.
- 11. Gifts except those representing items of personal property, such as a radio, chair, etc.
- 12. Court orders.
- 13. Services or care received under an enforceable contract. (WAIC 3075, 3460, 3472)

B-538 DIVISION OF INCOME WITH SPOUSE

B-538

The division of income with a spouse is subject to the following considerations:

- 1. Is the income separate or community?
- 2. Is the income derived from earnings (either present or past) or from property (either real or personal)?
- 3. If the income is derived from earnings (present or past) is it due to the work of the recipient or of the ineligible spouse?

If the recipient has community income from current earnings, or resulting from past employment (civil and military pensions, OASI, or regular payments received because of industrial or unemployment compensation laws, etc.), he may allocate to his spouse a portion of such income. The amount allocated shall not exceed one-half of the income, and it shall not exceed a reasonable amount necessary for the support of the spouse, as determined by investigation in each individual case. No allocation of such income may be made for the support of minor children. No allocation shall be made to the spouse until the recipient has had his full maximum of exempt income, in accordance with Sec. B-540, and B-542, where applicable.

153-80 Restated

B-540 (Continued)

B-540

- Example 1: An ANB recipient has exempt income from earnings of \$40 a month. In addition, he has income from a life insurance policy of \$10 a month. Discussion with the recipient reveals that he has a special need for a telephone in the amount of \$4.00 a month. The recipient receives a grant of \$79.
- Example 2: An ANB applicant (not eligible for APSB because of residence) has earned income of \$80 a month. In addition he receives \$20 a month from a son. Discussion with the applicant reveals he has special needs for housekeeping service and a telephone which totals \$50 a month. Since \$50 of the earned income is exempt from all consideration, the applicant actually has \$50 (\$30 plus \$20 from the son) non-exempt income with which to meet his needs. Therefore, special need of \$50 is established and the applicant is eligible to the maximum grant of \$85.
- Example 3: An ANB recipient (not eligible for APSB because of residence) has earned income of \$80 a month, and in addition, receives \$20 a month from a son. Discussion with the recipient reveals he has special needs for medical and housekeeping services which total \$70 a month. Since \$50 of the earned income is exempt from all consideration, recipient actually has \$50 (\$30 plus \$20 from the son) of non-exempt income with which to partly meet his needs. While special needs of \$70 are established, there is only \$50 of non-exempt income to be applied toward meeting these special needs, leaving an unmet need of \$20. The recipient receives the maximum grant of \$85.
- Example 4: A married ANB recipient (ineligible for APSB because of residence) has net imcome from earnings in the amount of \$110 a month. His wife has no income and her need has been determined to be \$80 a month. Since the \$110 is community income from earnings (see Sec. B-538), one-half, or \$55.00 may be allocated to the support of the spouse, leaving \$55 as income to the recipient, of which \$50 is exempt. Thus the recipient is entitled to a grant of \$80 (\$85 minus \$5 non-exempt income), if he has no special needs.

If in the same example the recipient's income from earnings was \$87 a month, the first \$50 would be considered exempt to him, and the spause would be allocated \$37 toward her support.

The case record shall show the method used in determining the amount of net earned income exempt from consideration in computing the amount of aid. (WaIC 3075, 3084.3)

B-542 EXEMPT INCOME IN APSB

B-542

The annual net income of an applicant for APSB from any of the following sources of a combined total value not exceeding \$1000.00, increased by one-half of that part of his annual income which is in excess of \$1000.00, shall not be considered in determining the amount of aid:

- (a) Income from his labor or services.
- (b) The value of foodstuffs produced by him or his family for his use or that of his family.
- (c) The value of firewood and/or water produced on his premises or given to him by another for his use.
- (d) The value of gifts.

(Section Continued on Next Page)

151-30 157-05 08 420 B-538 (Continued)

B-538

If a male recipient is receiving OASI benefits, the apportionment to his wife shall not continue after she has reached the age of 65 at which time she becomes eligible by virtue of her husband's "primary benefits" to payments in her own right, provided: (1) she is the mother of a child of the recipient or (2) she was married to the recipient at least thirty-six calendar months before the month in which she filed application for benefits. (A dependent husband of a currently insured spouse is eligible for one-half of her old-age insurance benefit at age 65, provided he meets other requirements.)

However, if the spouse files a claim for OASI benefits immediately when eligible to do so, apportionment may continue until the spouse receives an award. If the spouse refuses to file a claim, apportionment shall not continue after the month in which she reaches her 65th birthday. If the wife does not qualify for benefits as provided above, her husband may continue to apportion up to one-half of his benefits to her even though such benefits are his separate income.

If a serviceman's allowance is received by either of a couple, the ineligible spouse (unless otherwise stipulated by the serviceman) may be allotted as
much thereof as is necessary for his own support, and the support of his dependent children. (AGO NS5164, 5187; WAIC 3075, 3084, 3460, 3472)

B-540 EXEMPT INCOME IN ANB

B-540

The net monthly <u>earned income</u>, not exceeding \$50.00, of an applicant for or recipient of ANB shall not be considered in determining the amount of aid.

Earned income is that which is received as a result of the efforts of the applicant or recipient, i.e., remuneration for employment, self-employment or otherwise, including the cash value of all remuneration paid in any media other than cash.

Net earned income is that amount which remains after obligatory and mandatory deductions have been made and after allowance has been made for the other expenses incurred incident to the securing and retention of the earned income.

Returns from personal or real property holdings, such as the net income from rental of rooms, from purveying of board and room, from crops or livestock, etc., shall not be considered earned income unless such returns result from an appreciable and continuous effort on the part of the applicant or recipient.

All income other than earned net income, and earned net income in excess of \$50.00, shall be considered in determining the amount of aid. (See Sec. B-538, Division of Income with Spouses.)

B-544 (Continued)

B-544

A. FREE RENT

If an applicant or recipient is in receipt of free rent, the value placed thereon shall not be less than \$5 nor more than \$15. Within these minimum and maximum amounts, the value placed upon the shelter furnished without cost to the individual shall be determined by taking into consideration both of the following factors:

- 1. Comparable rental costs in the community. In no instance shall value placed upon free rent furnished an applicant or recipient exceed the rental charged for comparable shelter in the same community, except that the minimum amount set in the standard may not be reduced.
- 2. Adequacy of housing. The following definitions of sub-standard, intermediate, and standard housing shall be used to determine the degree of adequacy of the housing provided an applicant or recipient:
 - a. Sub-standard housing—a dwelling or a room which does not have adequate sanitary facilities, safety provisions, or any of the other factors mentioned below.
 - b. <u>Intermediate housing—a dwelling or a room which does not</u> have adequate provisions for privacy and comfort, but where there are adequate sanitary facilities and safety provisions.
 - c. Standard housing—a dwelling or a room which meets minimum standards of health, safety and decency, including such items as adequate privacy, sanitary facilities, and comfort.

In making the determination of the value to be placed on free housing, based upon a combination of the factors of comparable rental costs and adequacy of housing, one of three monetary amounts shall be used: the minimum amount set forth in the standard (\$5); the intermediate amount in the standard (\$10); or the maximum amount set forth in the standard (\$15).

If an applicant or recipient is residing in a makeshift shelter such as a dugout, cave, or tent, it is a "makeshift shelter." The value placed on free rent in such "makeshift shelter" shall not exceed \$3 a month.

The basis for the determination of the value placed on free rent shall be recorded in the case record.

B-542 (Continued)

- (e) The value of the use and occupancy of premises owned and occupied by him.
- (f) The net income from real and personal property owned by him.

Income in addition to the above specified shall be computed on the basis of net income.

If an application for APSB has been approved, the recipient shall be entitled to receive the maximum amount of aid each month, and retain net income up to \$1000 within any one yearly income period. If a person has net income of more than \$1000 in a given yearly period, an amount equal to one-half of that part of his monthly income which is in excess of \$1000 is deductible from the maximum grant until the end of the yearly income period. (See Sec. B-642, Adjustment in Amount of Aid.)

If the recipient is making an allocation to his spouse, no adjustment shall be made until the support of the spouse has been met, but in no event shall the amount allocated to the support of the spouse exceed \$1000 in a given yearly period. Such allocation shall not be made until the recipient has had his full maximum of \$1000 exempt income. (See Sec. B-538, Division of Income with Spouse.)

An applicant (including original application, restoration, redetermination, transfer from ANB, and reapplication) for APSB who has a regular monthly net income, in excess of \$168.33 is ineligible to APSB even though he has a spouse without other means of support.

An educational scholarship which has been awarded to a recipient of APSB while he is regularly attending any public school in this State or any institution of higher learning in this State, shall not be deemed property, income, or resource for any purpose, and no deduction shall be made from the recipient's amount of aid because of such scholarship. (Walc 3400, 3447, 3460, 3472)

B-544 VALUE OF CONTRIBUTIONS IN KIND

B-544

B-542

The value placed upon rent, utilities, food, or other items of support contributed in kind to an applicant or recipient shall not be in excess of an amount which will permit him to meet his other needs, such as incidentals, transportation, etc.

The following factors shall determine the monetary value of shelter and utilities and room and board for which the applicant or recipient is not required to pay because they are furnished by relatives, employers, or others:

B-548

The value of occupancy is determined in accordance with the assessed value of the property. The full assessed value is considered in determining the value of occupancy to the recipient, whether he alone occupies the home which he owns or whether it is shared with his spouse, or with others who may have an interest in the property.

Clarification 152-10 Restated

If the home is the separate property of the ineligible spouse who alone is bearing the cost of upkeep, taxes, etc., the recipient is, in fact, receiving free rent. The value is determined as in any other case in which free rent is contributed by another. If the recipient shares in the cost of upkeep, taxes, etc., he is considered to be paying rent. (See B-544, Value of Contributions in Kind)

The recipient who holds life estate in the property he occupies is guaranteed the use of the resource, and its occupancy value shall be considered in the same manner as though the recipient held title to the property.

The following table sets forth the occupancy value of <u>unencumbered homes</u> in accord with the county assessed valuation of the property.

Asses	ssec	d Value	9										1	lalue	of Occupancy
\$500	or	less													\$3.00
															4.00
		1500													5.00
1501	to	2000													6.00
2001	to	2500													7.00
2501	to	3000								9					8.00
		over													9.00

The application of the table may be modified if basic needs of the recipient other than shelter can not be met due to the excessive cost of taxes or assessments. In such event, the case record shall show the particular cost which necessitated a modification.

Encumbered homes have a value of occupancy which shall be determined by subtracting from the appropriate value of occupancy as shown in the table for unencumbered homes the required monthly payment on liens (including principal and interest). The remainder, if any, is the net value of occupancy on encumbered homes.

B-544

B-544 (Continued)

B. FREE UTILITIES

If <u>all</u> utilities are included in the free shelter provided, \$6.30 shall be added to the value placed on the free rent. Thus, for free rent and free utilities the value to be used if housing is set at the minimum amount, shall be \$11.30 a month; if housing is set at the intermediate amount, \$16.30 a month; and if housing is set at the maximum amount, \$21.30 a month.

C. FREE ROOM AND BOARD

If free room and board are provided, the individual ordinarily has no expense for household maintenance and replacements; in which case the value for room and board shall be the sum of the values placed on free rent (\$5, \$10, or \$15), free food (\$28.50), free utilities (\$6.30), and household maintenance and replacements (\$4.50). If the room and board does not include all of these items, the total value of the items which are included shall be regarded as the value of the room and board. (Wall 3075, 3084, 3450, 3472)

B-546 OFFER OF SUPPORT AS INCOME

B-546

A mere offer of a contribution for support by a responsible relative or anyone else is not in itself sufficient to render a recipient ineligible or eligible to a lesser amount of aid. Only contributions for full or partial support which are actually received or unconditional offers of cash shall be considered as income.

The following statements apply to all offers in kind from any source and to all conditional offers of cash in either of which the applicant or recipient does not have a property right. If the cash offer is dependent upon fulfillment of a certain condition or upon refraining from a particular act, e.g., living or not living in a certain place, upon refusal of the offer by the applicant or recipient, he shall be granted aid, if otherwise eligible. (AGO NS1040, NS2300; 20 Cal (2) 870) (Walc 3049, 3075, 3449, 3460)

B-548 OCCUPANCY VALUE OF HOMES OWNED BY RECIPIENTS

B-548

Homes owned and occupied by applicants or recipients are considered currently used resources and the value of their use shall be considered in computing the amount of aid.

(Section Continued on Next Page)

B-548 (Continued)

B-548

any necessary laundry expense because of the roomers, and the cost of replacement of linens or other household equipment used in connection with the rental of rooms. If the monthly total cost of pro-rated taxes, insurance, the required encumbrance payments (principal and interest), if any, \$2 monthly allowance for minor repair and upkeep (or the recipient's monthly share thereof), and the net occupancy value, if any, exceeds \$15, the amount in excess of \$15 shall be allowed as special need in ANB. (See Sec. B-612 for maximum allowances.)

Example 4: A recipient and his spouse own their own home and rent two rooms receiving \$30 gross rental. The extra cost of utilities of the roomers is determined to be \$2.50 a month. The laundry cost for linen used by the roomers is estimated at \$2 per month, and the cost of replacement of linen, etc., is estimated at \$1 per month. The couple's net income from the roomers is \$30 less \$5.50 (\$2.50 utilities, \$2 laundry, and \$1 replacement) or \$24.50 (\$12.25 each). The home is assessed at \$1100 and is encumbered. The required monthly encumbrance payment is \$18 and there is no net occupancy value. City and county taxes average \$12 a month, insurance \$1, and upkeep \$2. The couple \$1.50 each. This is \$33 (\$18 encumbrance, \$12 taxes, \$1 insurance, and \$2 upkeep) or \$16.50 each. This is \$1.50 more than the basic housing cost for each ANB recipient (\$15) and therefore there is a special need for housing in the amount of \$1.50 per month. In the absence of other special need the total need in ANB is \$86.50 (\$85 plus \$1.50). Deducting the \$12.25 income from total need results in a grant of \$74.25.

Two or more separate dwellings, one of which the recipient occupies, may be located on property owned by him. The value of occupancy of the one dwelling shall be determined by dividing the assessed valuation of the whole property by that fraction which represents the number of rooms in the occupied dwelling over the total number of rooms in all dwellings located on the property.

Example 5: Property has front house of six rooms and rear cottage of three rooms which is occupied by recipient. Value of occupancy of rear cottage would be based on 3/9, or 1/3 of the total assessed value of the whole property. The net income from the rented dwelling shall be determined according to Sec. B-550.

Farm or ranch homes are usually located on property consisting of a number of acres. In general, it shall be considered that one acre of the land is attached to the dwelling, and the value of occupancy shall be based on the assessed value of the dwelling and one acre of land.

Example 6: Home consists of dwelling and 20 acres of orchard. Assessed value RE \$1000, Imp. \$300, total \$1300. Value of occupancy would be computed on the assessed value of \$350 (Imp. \$300: RE \$1000)

If an income is derived from the orchard the net income shall be computed in accordance with Sec. B-554, Income from Crops or Livestock, and the taxes on the balance of the land (950 or 19 of taxes on whole property) is considered an expense and allowed in determining net 1300 26 income from that portion of the property.

If the home is a part of business property such as chicken, dairy, or other ranching enterprise, and the assessed value of improvements (or buildings) in part belongs to the enterprise and in part to the dwelling, the portion of the assessed value of improvements to be considered as belonging to the home is left to the judgment of local authorities, unless allocation of assessed value of the dwelling can be secured from the assessor's records. Value of occupancy shall be computed on assessed value as with other homes.

B-548 (Continued)

B-548

Example 1: Property owned by a single recipient assessed at \$1200 is encumbered for \$250. Monthly payments on the encumbrance are \$3.00 (principal \$2.50 and interest 50¢).

Value of occupancy from Table for unencumbered homes\$5.00
Less payments on encumbrance

Net value of occupancy\$2.00

If payments on liens, including principal and interest, or on a contract of sale (principal and interest) are required to be paid periodically, i.e., quarterly, semi-annually, annually, or at other stated non-monthly intervals, the required payment shall be pro-rated on a monthly basis. This pro-rated figure shall be considered as the equivalent of the required monthly payment, and shall be deducted from the table value of occupancy in order to determine the net value of occupancy.

If a home is owned as community property each of the couple is responsible for one-half the encumbrance payment. Therefore, only one-half of the required monthly payment on the encumbrance (or on a contract of sale) is to be deducted from the value of occupancy as set forth in the table.

Example 2: A home occupied by a couple is assessed at \$1,350. The required monthly payment on a \$300 encumbrance is \$7.00 per month (principal and interest). The net value of occupancy for each of the couple is computed as follows:

Value of occupancy from table for unencumbered homes
Net value of occupancy\$1.50

<u>Duplex dwellings</u> usually contain two identical units. The value of occupancy of one unit occupied by the recipient shall be based on one-half the assessed value of the whole property. The net income from the other unit shall be determined in accord with Sec. B-550. Income from Real Property.

An apartment in a building owned by the recipient has a value of occupancy which is determined by dividing the assessed valuation of the whole property by the number of apartments. The net income from the other apartments is determined in accord with Sec. B-550.

Example 3: Apartment house of four comparable units is assessed for \$2800. Net value of occupancy of one unit (occupied by recipient) is based on one-quarter of assessed valuation of the whole property.

If rooms (as distinct from apartments) in a home owned and occupied by the applicant or recipient are rented, the net value of occupancy, if any, and any net income from roomers shall be considered in determining the amount of aid. The net income from roomers shall be determined by deducting from the gross income from roomers the cost of extra utilities due to rental of rooms,

B-550 (Continued)

B-550

- 1. Deduct the amount actually expended for upkeep and repairs for each unit, or
- 2. Deduct 15% of the gross monthly rental value plus \$4.17 a month for each unit. If this method is used, no additional allowance is made to cover actual expenditures for upkeep and repair.

Principal payments on encumbrances are not deducted when determining net income from real property except as provided in Sec. B-548, Occupancy Value of Homes Owned by Recipients.

Net rental from property in which life estate is held shall be considered income. Net rental paid by one who is a responsible relative of the owner or the life tenant is interpreted as rental from property owned rather than as a contribution from a responsible relative. (See Sec. B-424, Life Estate Interest)

Under the ordinary life estate agreement, the life tenant is assured occupancy of the property, is entitled to all the income therefrom, and is responsible for payment of taxes, upkeep and other obligations to keep the property in good condition. If expense items for which the life tenant is responsible are paid by another, the amount thereof represents income. (CC 818, 840)

Payments made in accord with a life estate agreement which stipulates that the remainderman shall be responsible for the payment of certain expenses do not represent contributions to the life tenant. If property in which life estate is held was encumbered by the remainderman either before or after the creation of the life estate, encumbrance payments made by the remainderman shall not represent income to the life tenant.

If the existing life estate agreement is a verbal agreement only, it is advisable that it be confirmed in a notarized written statement signed by the remainderman and the life tenant and that a copy of such agreement be filed in the county welfare department record.

In APSB, the value of the free use and occupancy of property during the statutory redemption period of one year following a foreclosure sale represents income. (AGO NS3033, NS3033A)

That portion of payments from the sale of real property, sold under contract of sale, title not passing, which represents principal payments is considered conversion of property from one form to another. (See Sec. B-457 on Conversion of Property.)

Any interest included in such payments represents income. Allowance shall be made for interest payments on prior encumbrances, in order to determine the amount of net income. (AGO NS4943) (Walc 3075, 3084, 3460, 3472)

B-548 (Continued)

B-548

Example 7: The home is on a dairy ranch. The assessed value is RE \$1000, Imp. \$2000, Total \$3000. Improvements consist of a small three-room dwelling and a large modern barn, dairy, etc., on 50 acres. It is determined by local authorities that the dwelling represents only \$\frac{1}{2}\$ of the value of all improvements. The assessed value of the dwelling shall be \$500 + \$20 (1 acre of land or \$1000 = \$20) or \$520.

If the home is part of an urban business property such as store building with apartment above, the assessed value of the portion used as the home shall be determined as above.

Homes on land owned by another may be assessed as personal property to the owner of the dwelling. Determine the value of occupancy in the same manner as for real property. Such homes may include cabins on Federal lands such as national forests, Indian reservations or allotments, land owned by a corporation or private land owned by another, etc.

If the dwelling is not assessed, the value of occupancy shall be based upon the appraised value in accord with the following table.

Value of Occupancy as Determined by Appraised Value

Appra	iis	ed Val	ue											1	Va.	Lue	of Occupancy
\$500	or	less			0												\$3.00
501																	4.00
800																	5.00
1000	or	over	•	0	6	0	0	0						•	•		6.00

If rent is paid for the land on which the dwelling rests, the value of occupancy is determined by subtracting the monthly land rent from the appropriate figure set forth in the foregoing table. (Walc 3075, 3084, 3460, 3472)

B-550 INCOME FROM REAL PROPERTY

B-550

Net income from real property, other than the net value of occupancy of a home owned by an applicant or recipient is that income which is available to him, after deducting any expense in obtaining it, such as taxes, interest, upkeep and assessments.

Taxes, assessments, interest, etc., are a matter of record, and are deducted in the amount required. The amount to be deducted for upkeep and repairs of each unit of rental property shall be determined in accordance with either of the following methods:

B-554 (Continued)

B-554

Proceeds from the sale of the increase of livestock represent income to be considered in the month received. Expenses incident to raising the livestock such as feed, pasture, rent and prorated personal property tax shall be considered in determining the net income to the recipient.

The recipient shall be requested to keep an account of his income and expenditures. It is his responsibility to make his records available to the county if verification of the net income is required. (WAIC 3075, 3084, 3460, 3472; AGO NS5736)

B-556 INCOME FROM SUBRENTAL OF ROOMS

B-556

Net income from subrental of rooms shall be determined as follows: (See Sec. B-540, B-542, Exempt Income in ANB, APSB)

A. Rented House is Primarily Recipient's Home

The net income from subrental of rooms in a rented house, if such house is primarily the recipient's home, is determined by deducting from the gross rental income those expenses which are allocable to the roomers, i.e., extra cost of utilities, laundry, cost of replacement of linen or other equipment used in connection with the rental of rooms, etc. (In ANB, if the applicant's or recipient's share of rent paid for the entire house is in excess of the basic rental allowance (\$15), the amount in excess thereof represents special need provided adequate housing is not available at less cost within the community, a health condition requires close proximity to a medical or shopping center, or the employment of the recipient or his spouse makes proximity to the place of employment a factor.)

Example: A couple, one of whom is an ANB recipient, rent a house, no utilities included, for \$40 a month or \$20 each. The share of each is \$5 in excess of the Basic Rental allowance (\$15). They subrent a room and their gross rental income is \$30 a month. The extra cost of utilities because of the roomer is determined to be \$1.50 per month. There is no expense for laundry but the cost of replacement of linen, etc., is estimated at 50g a month. The net income from subrental of rooms is \$28 or \$14 each (\$30 less \$1.50 utilities and 50g replacements, divided by 2). Since adequate housing is not available in the community for less than \$40 a month special housing need is established for each recipient in the amount of \$5 a month. In the absence of other special need, the total need is \$90 a month in ANB. Deducting the \$14 income from total need results in a grant of \$76 in ANB.

If it is determined that the income from the subrental of rooms is earned income, the recipient's share of the net income in this example would be exempt. (See Sec. B-540, Exempt Income in ANB)

B-552

B-552 INCOME FROM PERSONAL PROPERTY

Returns in the form of interest on money, bank or building and loan accounts, bonds, dividends upon stock, or other returns from personal property represent income.

Cash received as beneficiary of an insurance policy other than an insurance policy of the spouse, and cash received on a periodic basis from an insurance policy owned by recipient (whether life, disability, compensation, or retirement insurance), represents income. (WAIC 3075, 3460)

B-554 INCOME FROM CROPS OR LIVESTOCK

B-554

Net income from the sale of crops or other farm products represents income considered in the month in which it is received. Net income shall be deded by deducting the expenses which are incident to its receipt from the to be considered in the month in which it is received. Net income shall be determined by deducting the expenses which are incident to its receipt from the gross income. This does not include principal payments on encumbrances.

Due to the number and kind of products produced, the wide variation in the particular items of expense in connection with them, and the frequency with which the income is received, no method of determining net income can be prescribed which is applicable in all cases. The facts in the individual case shall be given consideration. The following expense items are among those which shall be considered: Taxes, assessments, interest, crop insurance, water, seed, the cost of spraying, pruning, and other cultivation costs, food, wages, cost of necessary repair and minor replacement of equipment, etc.

Certain expenses such as taxes, assessments, etc., are determinable on an annual basis. It is recommended that such expenses be allowed on the basis of a fiscal period terminating prior to the receipt of the income. If the crop is such that the income is received semi-annually or at more frequent intervals, the proportionate share of the annual expenses may be considered together with other expenses which are attributable to the production of the particular crop or product.

Upkeep expense is computed on the basis of actual expenditure and is not ordinarily applicable to any one crop. It may be deducted from the income from the crop or crops which mature next following the upkeep expenditure.

If the nature of the crop or product is such that it is desirable to determine the net income quarterly or semi-annually, any loss which is sustained for a particular period may be carried over as an expense to be added to the expense applicable to the next period.

B-560 (Continued)

B-560

- 1. Personal income withholding taxes.
- 2. Social Security taxes (unemployment insurance, old age and survivor's insurance, etc.)
- 3. Food--The reasonable cost of lunches or other meals necessarily purchased away from home due to employment.
- 4. Clothing—The cost of purchase of suitable clothing for employment.

 (Although purchase of new clothing may not be necessary, employment may result in increased cost of clothing replacement.)
- 5. Laundry and Cleaning Service—The cost of laundry and cleaning service if necessary because of employment.
- 6. Transportation--Cost of transportation incident to employment.
- 7. Union Dues.
- 8. Equipment necessary to the employment, such as cost of tools, etc.

The case record shall show the method used in verifying the gross income. Those items which are deducted from the gross income shall be clearly set forth so that the method by which the net income is computed is indicated. (WAIC 3075, 3460)

B-562 GENERAL RELIEF AS INCOME

B-562

General Relief granted to an applicant or appellant pending the determination of his eligibility constitutes net income for the month within which it is received, and shall be taken into consideration in the computation of any retroactive or current grant for such month(s).

If GR is granted in order to enable a recipient to meet special needs, the amount of GR constitutes income for the month within which it is received, to be related to the recipient's total needs for that month.

Emergency GR granted a recipient who has lost or spent his grant and given for the purpose of enabling him to meet his basic needs for the remainder of the month, may be considered casual income, not subject to collection or adjustment. If it is not considered casual income it shall be treated as other income, with an adjustment to be made within the current adjustment period or a repayment to be collected within the current adjustment period and to be reported to the SDSW in the same manner as other repayments of aid. (WAIC 3075, 3460)

B-556 (Continued)

B-556

Rented House is Rooming House Operated Primarily as a Business Enterprise

Net income from the subrental of rooms in a large rented house occupied by the applicant or recipient, but operated primarily as a rooming house enterprise, is determined by deducting from the gross rental income the cost of extra utilities, replacement, services essential to the operation of the business, and in ANB the amount by which the rent paid for the property exceeds the basic allowance for rent (i.e., \$15 for a single recipient or \$30 for a couple). (In ANB, "Special Need" for housing shall not be allowed in determining the recipient's total need if the rental of rooms is primarily a business enterprise.)

Example: An ANB recipient rents a ten room house in order to operate a rooming house enterprise and pays \$70 a month rent. She retains two rooms for her own use and subrents eight rooms. Gross rental received by the recipient is \$20 a month for each room or a total of \$160 a month. Extra utilities for roomers cost \$20 a month, linen replacements \$6, and housecleaning services \$25. The ANB recipient's rental payment of \$70 exceeds the basic rental allowance of \$15 by \$55. Total excenses allocable to the roomers are \$106 (\$65 for rent, \$20 utilities, \$25 cleaning, and \$6 replacements). Net income to recipient from rooming enterprise is \$54 (\$160 less \$106). The grant is, therefore, \$81 since \$50 of the earned income is exempt. (W&IC 3075; 3084.3, 3460, 3472)

B-558 INCOME FROM PURVEYING OF BOARD AND ROOM

B-558

expenses incident to the rental of the rooms. The difference between the amount of board and room paid and the expense represents the net income. The control of the rooms will vary with the individual situation vided which will fit all situations.

The recipient shall be requested to keep an account of his income and expenditures. It is his responsibility to make his records available to the county if verification of the net income is required. (See Sec. B-556, Income from Subrental of Rooms; B-548, Occupancy Value, etc.) (W&IC 3075, 3460)

B-560 NET INCOME FROM WAGES, SALARIES, AND COMMISSIONS

B-560

The net income from wages, salaries, or commissions paid for services rendered by a recipient is that amount which remains after all obligatory and mandatory deductions are made, and after allowing for the expenses incurred incident to the securing and retention of the employment. Such expenses may include:

B-566 (Continued)

B-566

. The portion of the income paid to dependents under an existing court order shall continue to be considered unavailable to the recipient provided his request for review by the court is initiated within three months from the date he was notified to do so (three months from the date application was granted in the case of an applicant). If the recipient has failed to initiate his request by the expiration of that period, the income paid to his dependents under the existing court order shall be considered available to meet his own need ..

The case record shall show the date and provisions of the original court order, and any subsequent modifications thereof. The record shall also show the basis for the determination that any portion of the recipient's income is unavailable for his own support. (Walc 3075, 3460)

B-568 INSURANCE PREMIUMS PAID FOR RECIPIENT

B-568

Premiums paid by another on the applicant's or recipient's life insurance shall not be considered income. (W&IC 3047.2, 3075, 3447, 3460)

B-570 CONTRIBUTIONS FROM LEGALLY RESPONSIBLE RELATIVES

B-570

The amount of contributions received from legally responsible relatives g in cash, the value of items of support given in kind, i.e., room, board, clothing, etc., and payments made by responsible relatives on behalf of the recipient and for which the recipient is responsible, i.e., mortgage payments on the recipient's real property, etc., represent income. (See Sec. B-582)

There shall be no arbitrary division of earnings of minor children. The method of determining the amount of the earnings of the minor child to be used in a household in supplementing or in any way determining the amount of aid to be granted shall be based upon the emancipation of such minor. (See Sec. B-594, Emancipation of Minors) (W&IC 3075, 3084, 3088, 3460, 3474)

B-572 INCOME FROM CERTAIN GOVERNMENT SOURCES

B-572

The income or benefits which an applicant or recipient derives from the sources listed below shall be considered in computing the amount of aid. The individual is the primary source of information as to the receipt of the income, and his sworn statement as to its receipt and amount may be accepted without further verification unless the information obtained from him is inconsistent or when conflicting information is received. The individual may have in his possession documents which will establish whether he is receiving the income.

B-564 LOANS AS INCOME

B-564

A bona fide loan contracted by a recipient carries with it the for repayment, and hence cannot be considered as making available to the recipient property of income. The funds derived as a result of a bona fide loan, as distinguished from a gift, are equalized by the corresponding indebtedness incurred. The proceeds of such loans shall not be considered income to the recipient when they emanate from non-responsible relatives, friends, persons or agencies, including fraternal, benevolent, and non-profit organizations, and private institutions on whom there rests no legal obligation for support.

Loans from a responsible relative may be considered as income because of the legal responsibilities of the relative, provided the responsible relative has the pecuniary ability to contribute the amount of the loan. The loan shall not be considered income when the relative has no such pecuniary ability and the loan must be repaid.

Real and personal property holdings shall be re-evaluated on the first of the month following the receipt of a loan to determine whether such holdings are within the maximum permitted. (Waic 3075, 3088; 3460)

B-566 INCOME AND COURT ORDERS

B-566

A. Court Order for Support of an Applicant or Recipient

If there is a court order for full or partial support of the applicant or recipient the income shall be considered to the extent received.

The case record shall show the date and provisions of the court order. If a determination is made that no amount or a lesser amount than that awarded by the court is received, the case record shall show the facts upon which that determination is based.

B. Court Order Requiring Applicant or Recipient to Support Others

The applicant or recipient may be in receipt of a regular monthly income, a portion of which is paid for the support of a spouse and/or children by order of a court. Such portion of the income as is paid for the support of these dependents under court order shall not be considered available to meet the needs of the recipient, provided the court was aware of the individual's need for public assistance at the time the order was issued. If his need was not known to the court, the applicant or recipient shall be advised to make his need for public assistance known to the court and to request the court to review the existing order.

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In order that the Form DPA I shall be forwarded to the local field office only when presumptive eligibility exists, the use of Form DPA 2, Inquiry Form for Determining Presumptive Eligibility of a Wage Earner for OASI Benefits, and Form DPA 3, Inquiry Form for Determining Presumptive Eligibility of Other than a Wage Earner for OASI Benefits, is suggested. These are work sheets and are not forwarded to the OASI field office. Their use by the county is optional if all information covered by them is included in the narrative.

The Bureau of OASI recommends that each county designate one of its staff as liaison officer between the county and the OASI field office to discuss eligibility problems or questions of procedure.

C. Railroad Retirement Annuities or Benefits

A former railroad workman or his beneficiary may be eligible to receive a railroad retirement annuity benefit. If the county finds it necessary to request information, it shall direct an inquiry to the Railroad Retirement Board, accompanied by Form Bl 228, Authorization for Financial Investigation, signed by the former railroad employee, his guardian or his beneficiary.

If a claim has been filed, the claimant will have been assigned a Railroad Retirement Board number. That number, and the former employee's social security number, should appear on all inquiries, if these numbers are known. Other essential information to be included in the inquiry is the name of the former railroad workman, alias or nick-name which he may have used, name of railroad for which he worked, approximate years of employment, and his particular railroad job title (i.e., brakeman, telegrapher). If the claim has been filed for more than a year, or if the former railroad employee has been deceased for more than a year, the inquiry should be addressed to the main office, Railroad Retirement Board, 844 Rush Street, Chicago, Illinois. Other inquiries may be addressed to:

District Office, Railroad Retirement Board 1006 4th Street, Sacramento 180 New Montgomery Street, San Francisco 1206 Santee Street, Los Angeles

D. Family Allowances for Dependents of Servicemen

Dependent upon the family need (or evidence of the intent of the serviceman) servicemen's dependents allowances may be allocated to best meet the needs of the family group. The case record shall

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The information outlined below is given as a guide in the event it is necessary to verify the amount of income received by an individual from the indicated sources, or if it is necessary to refer him to the proper agency because of presumptive eligibility for benefits.

A. Unemployment or Disability Insurance

Weekly benefits covering a full month's payment shall be prorated to monthly amounts on the basis of 4 1/3 weeks per month.

B. Old Age and Survivors Insurance

If the county believes that a claim for OASI has been filed but the individual cannot present the award certificate, disallowance letter, or other satisfactory evidence of the status of the claim, and if verification is required, the county shall complete Form DPA1, Request for Federal Old Age and Survivors Insurance Information, in quadruplicate and send the original and two copies to the local field office of the Bureau of OASI. One copy shall be retained in the case record.

If a claim has been acted upon, the appropriate part of the form will be filled in, and one copy returned to the county. If a claim has been filed but not acted upon, a notation to that effect will be entered on a carbon copy of the form and it will be returned. The field office will notify the county later of the final action on the claim.

If the county believes that an individual may be eligible for OASI, that person shall be referred to the local OASI field office. The county shall give him an original and two copies of Form DPA 1 to give or send to the field office. If he files a claim, the field office will make a notation to this effect on a copy of the form, return it to the county, and will notify the county when final action is taken on the claim. If no claim is filed because the person is obviously not entitled to OASI benefits, all copies of the form will be returned to the county with an explanation why he is ineligible. If a person is apparently eligible for OASI benefits but does not wish to file a claim, all copies of the form will be returned to the county with a statement regarding his apparent eligibility and unwillingness to file a claim.

In rural areas where traveling distance to the field office is not convenient for referral, there is an "itinerant service." The county shall communicate with the OASI field office to obtain a schedule of this service and to make necessary arrangements for the applicants, presumptively eligible for insurance payments, to be interviewed. The county shall furnish the field office with the name, address, social security number, and name of the insured if the prospective claimant is other than the wage earner under whose account benefits may be payable.

B-572

The Veterans Administration issues an award letter containing the amount, beginning date, and sometimes termination date, of any payments to a veteran or to the veteran's dependents or beneficiaries. If the person who has received or is receiving any such benefits is unable to give complete and accurate information, the county shall direct an inquiry to the Veterans Administration, accompanied by one copy of an authorization signed by the veteran, if living, requesting release of the information. Such authorization may be in the form of a letter, but if possible should be on Veterans Administration Form VA 3288, "Release of Information from Claimant's Record - Request for and Consent To." The form is available at any Veterans Administration Office. The authorization and request should always contain the veteran's claim number (C- or XC-) or his service serial number (S-). If the inquiry concerns insurance, the insurance number (V-, N-, or K-) should also be included. If the county is unable to obtain a signed authorization from the veteran or his guardian, the narrative shall clearly state the reason.

The letter of inquiry shall be addressed as follows:

1. Concerning insurance, death benefits, disability retirement, or dependents' benefits

Chief, Dependents and Beneficiaries Claims Service Veterans Administration District Office No. 12 1509 Clay Street Oakland 12

2. Concerning compensation or pension

Chief, Adjudication Division Veterans Administration Regional Office 49 4th Street San Francisco

or

Chief, Adjudication Division Veterans Administration Regional Office 1380 Sepulveda Boulevard Los Angeles

If the veteran is deceased and the beneficiary is unable to present an award letter or other information concerning the claim for benefits, the beneficiary may sign the Form VA 3288. The inquiry letter shall be addressed the same as for a living veteran.

If the veteran is deceased and the potential beneficiary has no information concerning the claim, a letter requesting the information shall be written by the county to the Veterans Administration, giving as much identifying information concerning the veteran as is available, and a statement concerning the relationship of the veteran to the applicant or recipient. The letter shall be addressed to the Chief Attorney at the San Francisco or Los Angeles address above. (Walc 3075, 3081, 3084, 3460, 3470, 3472)

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show what allocation was made and the reason. The spouse of a recipient may apply to his or her own support and the support of his dependent children such of the income from servicemen's dependents allowances as is necessary before applying the remainder, if any, to the support of the recipient. If a servicemen's allowance is received by either of a couple, the spouse (unless otherwise stipulated by the serviceman) may be allotted as much thereof as is necessary for his or her own support.

If information is required, it shall be secured from the Office of Dependency Benefits. The county veterans service officer will be able to furnish the name and address of the correct ODB office of the armed service to which an inquiry should be directed by the claimant.

Since the Office of Dependency Benefits has consistently maintained that its relationship is solely with servicemen and their dependents, the county should not write the ODB about particular case situations except as a last resort. If necessary, the county may assist in the preparation of the inquiry but should not be identified with it. The inquiry should include the serial number of the serviceman, his present address, and other identifying information. Omission of identifying information may result in delay or, in many cases, make a reply impossible.

233-40 Restated

Military Pensions

Income from death benefit, insurance, compensation, pension, retirement, or dependent's benefits may be available.

The following persons may be entitled to receive veterans benefits:

- 1. A man, if he is a veteran, the dependent spouse of a veteran, or the dependent father of a veteran.
- 2. A woman, if she is a veteran, the wife of a veteran, the unremarried widow of a veteran, or the dependent mother of a veteran.
- A minor child, if a parent died while a member of the armed forces or a parent was or is a veteran.
- The guardian of the veteran or of his estate.
- 5. Any person, if named as beneficiary of a veteran or if next of kin in survivorship of a veteran.

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460-88 Restated

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- 2. Expenses incident to employment.
- 3. Expense necessary for operation of commercial or agricultural enterprise, including the cost of livestock, taxes, interest, and principal payments on encumbrances; necessary business and operating expenses which are past due and unpaid, representing an obligation against the enterprise; depreciation; expenditures necessary to maintain the capital investment; etc.
- 4. Legal obligations and contracts already incurred; debts accumulated; medical or dental bills, with special regard for any additional health problems in the family.
- 5. All regular monthly expenditures (including any periodic insurance premium payments) necessary to maintain their standard of living in the community.
- 6. Federal and state incomes taxes. (WAIC 3075, 3088, 3088.1, 3460, 3474, 3474.1; AGO NS863; SDAA)

B-584 STATEMENT OF RESPONSIBLE RELATIVE

B-584

The Statement of Responsible Relative of Applicant for Aid to the Blind, Form Bl 225, is an acceptable method of determining the pecuniary ability of a responsible relative to contribute to the support of the applicant or recipient. Form Bl 225 may be used (1) to determine the amount the relative will actually contribute after aid is granted; (2) to determine the actual contribution at the time of redetermination of eligibility, (3) to provide information to be used in evaluating the circumstances of the relative to determine whether there is ability to contribute; (4) to serve as a guide when the district attorney or other civil legal officer of the county is requested to recover a portion or all of the aid granted. It may also be used when changes in the contribution are reported by the applicant, recipient, or relative.

The county may (1) mail Form Bl 225 to the relative for completion; (2) request the relative to complete it during an interview; or (3) obtain the necessary information in an interview and record the information obtained elsewhere in the case record. If the pecuniary ability of relatives to contribute to the support of the applicant or recipient is determined in an interview with the relatives, the interview shall cover the points set forth on Form Bl 225.

Aid shall not be denied if the responsible relative fails to return his signed statement unless the determination indicates:

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B-582 DETERMINATION OF PECUNIARY ABILITY OF RESPONSIBLE RELATIVES

B-582

The statutes provide that the following relatives of an applicant or recipient are legally responsible for his support if they are living in this State and are financially able to assume such support, either in whole or in part: husband or wife, parent, or adult child. The law authorizes (but does not require) the county to take recovery action against such relatives if financially able to make a contribution toward the support of the blind person.

The county shall determine the pecuniary ability of all legally responsible relatives (spouse, parent, or adult children) residing within California, except any such relatives who are receiving public assistance, to contribute to the support of the applicant or recipient. (See Sec. B-570, Contribution from Legally Responsible Relatives; Sec. B-546, Offer of Support as Income; Sec. B-234, Determination of Continuing Eligibility.)

The granting or continued receipt of aid shall not be contingent upon the filing of signed statements by responsible relatives or upon recovery of aid.

Aid shall be granted to qualified persons regardless of whether they have responsible relatives able, though not willing, to support or to contribute to the support of the person. (See Sec. B-584, Statement of Responsible Relative.)

If the county is unable to secure information regarding the pecuniary ability of the responsible relative to support, the applicant shall be interviewed on the following points:

- 1. His knowledge, if any, regarding the financial status of the responsible relative.
- 2. Date of applicant's last contact with the responsible relative.
- 3. Pertinent information concerning family relationships or attitudes that may prevent county from securing information from the responsible relative concerning his pecuniary ability to support.

All efforts made or procedures followed in determining pecuniary ability of responsible relatives or in securing support from responsible relatives shall be recorded in the case record.

Financial Obligations of Relatives

In determining pecuniary ability of relatives, the following items shall be taken into consideration:

1. Family responsibilities, including adequate support and care of dependents.

B-588 (Continued)

B-588

case, after giving due consideration to the needs of the adult child in the same manner as though he were not in the home. An adult child's responsibility for support is the same for two living parents as for one parent. Payment of room and board by an adult child does not alter his degree of legal responsibility as this represents an item of expense which must be met regardless of where the child lives.

B. Married Daughter's Income

If the responsible relative is a married daughter, and there is no agreement between the couple whereby the wife is permitted to retain her earnings as her separate property, the earnings of the wife represent the income of the husband since they are under his management and control. Under these circumstances, the daughter's responsibility for the support of the applicant or recipient is removed, and she is considered a dependent of her husband. Thus, if the responsible relative is a married daughter and the only income is community income of the couple, the daughter has no legal responsibility on which recovery action may be initiated.

C. Allowances from Relatives in Military Service

Allowances for parents, brothers, sisters, and grandchildren of servicemen are entirely voluntary and may be terminated at any time by the serviceman. Applicants and recipients shall not be required to request such allowances as a condition to the granting of aid. (W&IC 3075, 3088, 3088.1, 3460, 3474, 3474.1; AGO NS863; SDAA)

B-590 LEGAL ACTION AGAINST RELATIVES

B-590

If the person receiving aid has within California a spouse, parent, or adult child pecuniarily able to support such person but who is not supporting or contributing to the extent of his pecuniary ability, the county may request its legal officer to proceed against such kindred in the order of their responsibility to support. Upon such demand, the legal officer may on behalf of the county maintain an action against the relative in the superior court of the county granting aid. (Walc 3075, 3088, 3088.1, 3460, 3474, 3474.1; AGO NS863; SDAA)

B-592 RELATIVES LIVING OUTSIDE THE STATE

B-592

The county shall not contact responsible relatives, including members of the armed forces, who are living outside California unless there is reason to

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172-05 Restated

B-584 (Continued)

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- 1. That the applicant or recipient is in receipt of contributions from responsible relatives in cash or in kind;
- 2. That these meet the extent of his verified needs; and
- 3. That the responsible relatives are able and willing to continue such support.

If the relative has been requested to complete the Form Bl 225, and has not returned it by the time all other items of eligibility have been established, the county record shall show the further effort to secure it. This may include:

- 1. A follow-up letter to the responsible relative.
- 2. Interview with the applicant to determine if he can secure the responsible relative's cooperation in completing Form Bl 225.
- 3. Interview with the responsible relative, if possible.

The information given by the relative, either on Form Bl 225 or in the interview, shall be used in determining his pecuniary ability to contribute to the support of the applicant or recipient without further determination, unless there is conflicting information which required clarification. In no case shall an employer of a relative be contacted without first obtaining the consent of the relative involved, unless clarification is required and all other available sources of verification have been exhausted.

If Form Bl 225 is mailed to the relative, the county should complete the first section of the form. (Walc 3075, 3088, 3088.1, 3460, 3474, 3474.1; AGO NS863; SDAA)

B-586 SUPPORT FROM SPOUSE

B-586

If the spouse has separate income, the pecuniary ability of such spouse to contribute to the support of the applicant or recipient is determined in the same manner as the pecuniary ability of other responsible relatives. (See Sec. B-538, Division of Income with Spouse.)

If the spouse has community income, see Sec. B-538. (Walc 3075, 3088, 3088.1, 3460, 3474, 3474.1; AGO NS863; SDAA)

B-588 SUPPORT FROM RELATIVES OTHER THAN SPOUSE

B-588

A. Adult Child Living with Applicant or Recipient

The degree of legal responsibility of an adult child living in the home of the applicant or recipient shall be determined on the basis of the facts in each

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Restated

B-594 (Continued)

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2. The child not living under the parental roof shall, on the declaration of the parents, be considered to be emancipated if such child is, in fact, using his earnings and income for his own support. This presumption of emancipation may be refuted by clear and convincing evidence that such parent has not emancipated the child and is, in fact, appropriating any portion of the child's earnings or income.

Example: If the child has been permitted by the parent to retain his earnings without an accounting to the parent, such child would be deemed emancipated in respect to his earnings.

To assist in determining emancipation, the following should be ascertained:
(a) Did child obtain job through his own efforts or was job obtained by parent?
(b) Does child have final decision about collecting his own pay, either in cash or by check? (c) If by check, does the child cash his own check, and, after receipt of the cash, does the child retain his portion and only turn over the amount agreed upon to the parent? (WAIG 3075, 3460, AGO NS1822)

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believe that there is a contribution being made by such relatives which has not been reported by the applicant or recipient, or that the contribution being made is larger than reported. If the inquiry is required of relatives living outside California, it shall be by direct correspondence with the relative. Neither a sworn statement nor the usual responsible relatives' statement, Form Bl 225, shall be requested of a relative living outside California. (W&IC 3075, 3088, 3088.1, 3460, 3474.3; AGO NS863; SDAA) (See Sec. B-584, Statement of Responsible Relative.)

B-594 EMANCIPATION OF MINORS

B-594

A parent's right to his minor child's services and earnings may be released and surrendered. Such release, which sets the child free from legal subjection and gives him the right to labor for himself and collect and control his wages is called emancipation. A child is emancipated and the authority of the parent ceases upon (1) appointment of a guardian, (2) marriage, (3) attainment of majority.

The parent, whether solvent or insolvent, may relinquish to the child the right of controlling him and receiving his earnings. Abandonment by the parent is presumptive evidence of such relinquishment.

The parent may emancipate the minor as to the entire earnings or income of the minor and yet retain full parental control of the minor in all other respects; in which event, the minor would have the same financial responsibility towards the parent as any adult child, but no more.

Emancipation may be either expressed or implied; that is, it may be expressed in writing or orally, or by the actions of the parent and child. In determining the fact of emancipation, the reason for such emancipation must be ascertained and if it appears that the emancipation was made for the purpose of qualifying a member of the family for aid, or for a greater amount of aid than that to which he would otherwise be entitled, such emancipation shall be considered ineffectual for the purpose of eligibility for aid.

The right of emancipation can be exercised only by the parent. For the purpose of determing the cause of such emancipation, the following factors shall be weighed and determinations made:

1. There is a presumption that a child living under the parental roof is not emancipated, and, in order to establish emancipation in such instance, clear and convincing evidence sufficient to refute the presumption must be presented. Such evidence may be that emancipation was made at a time prior to any consideration on the family's part in applying for aid; that the need for aid was due entirely to factors other than the emancipation of the child.

B-605 (Continued)

B-605

The recipient shall have full use of the warrant and there shall be no state or county control of its expenditure. Payments of aid shall be delivered unconditionally to the recipient in the full amount of the grant for the sole use and benefit of the individual on whose behalf the grant is made.

Restricted Payments

A restricted money payment is one given under some condition or limitation which the agency imposes on the recipient's use of the money; i.e., it is a payment in which an express or implied requirement is made of the recipient that delivery of the aid warrant is contingent upon agreement to make certain or specified payments from the aid granted.

The warrant shall be issued to the recipient through the U. S. mail to the address at which he customarily receives mail, or delivered to him according to his instructions.

While the recipient may request the agency to deliver the warrant to him in a specified way, the county shall not determine on its own authority that delivery is to be made to any other person, nor may the county require any special endorsement or use other devices that necessitate the warrant being delivered to, or cashed by, or in the presence of, a specified person other than the grantee or his guardian.

The payment shall be accomplished without direction on the warrant or by letter, or by agreement as a condition of receiving the payment, or by other notification, that the recipient must use his money in a specified way or for a specified purpose.

Instances of several kinds of restricted payments are indicated as follows:

- 1. Directing that all or part of the aid payment must be applied to specific bills or for the purchase of specific goods or services. Statements to recipients explaining the basis on which the amount of the payment is determined are not in themselves restrictive.
- 2. Requiring that the recipient submit receipts for the purpose of showing how he has spent all or any part of his aid payment. This does not preclude the verification of rental or other budget items when the purpose is to determine the need of the individual as in the case of original or reinvestigation of eligibility.
- 3. Requiring the return to the county or deposit with the county of all or part of the aid payment for use in a manner designated by the agency.

DEFINITION OF A NEEDY BLIND PERSON

In ANB. a "needy blind person" means any person who by reason of loss or impairment of eyesight is unable to provide himself with the necessities of life and who has not sufficient income of his own to maintain himself.

In APSB, a "blind person" means any person who by reason of loss or impairment of sight is unable to provide himself fully with the necessities of life and who has not income and resources through his own means, as defined under the law, sufficient to provide a reasonable and decent standard of living. (W&IC 3005, 3403)

MONEY PAYMENTS AND RESTRICTIVE PAYMENTS B-605

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B-603

The Welfare and Institutions Code expressly provides that:

"No person concerned with the administration of this chapter shall dictate how any applicant shall expend the aid granted to him. " (W&IC 3003, 3402)

Money Payments

In accordance with the intent of this provision, aid shall be granted in conformity with the money payment principle. Money payments are designed to carry out the basic principles of preserving and maintaining human rights, and to assure the recipient the maximum freedom to be self-directing in the use of his funds. They serve as a protection from intrusion into his life, or invasion of his personal rights by governmental agencies. Money payments make it possible for a recipient to carry on his activities through the normal channels of exchange, enjoy the same personal rights and discharge the same responsibilities as do other members of the community.

Assistance payments, made in conformity with the money payment principle, provide that:

- 1. Aid shall be paid by warrants immediately redeemable at par.
- 2. Payments shall be made to the payee at regular intervals.
- 3. Use of the payment shall not be restricted, either directly or by implication.

B-605 (Continued)

B-605

or other more permanent arrangements, cashing the check, paying bills, and buying groceries and other items. Here again, not the character of the service but the way in which the service is provided will determine whether or not the aid payment is restricted. (W&IC 3003, 3008, 3075, 3042, 3460, AGO NS 1832, NS 2382, NS 3667, FSS-Admin.)

B-606 DETERMINATION OF THE AMOUNT OF AID

B-606

The maximum amount of aid which a person shall be entitled to receive shall be \$85 a month.

- 1. ANB: The amount of aid is determined by:
 - a) the amount of income other than exempt income;
 - b) the total need of the individual.

The monthly grant (not to exceed \$85) is the exact difference between the individual's total need and the amount of non-exempt income, if any. (See Sec. B-540, Exempt Income in ANB.)

Example: An ANB recipient has a total need of \$115. He has income from earnings in the amount of \$15 a month, and from the value of currently used resources in the amount of \$4 a month. The income from earnings is exempt, and \$4 is deducted from the total need. The grant is \$85 since it cannot exceed that amount.

If, in the same example, the individual had a total need of \$87.50, the grant would be \$83.50.

2. APSB: The monthly grant is \$85 until the full amount of exempt income is allowed. (See Sec. B-542, Exempt Income in APSB; B-642, Adjustment in Amount of Aid.)

After the allowance of exempt income is made, the grant shall be the exact difference between \$85 and the non-exempt income. (Waic 3075, 3082.1, 3084, 3084.3, 3089, 3460, 3472)

B-609 DETERMINING NEEDS - GENERAL AND ONLY

The law recognizes that the total need of the individual may actually be in excess of the maximum statutory grant of \$85 a month. If the circumstances of the individual are such that need in excess of \$85 a month exists, the cost of such need shall be considered in addition to the cost of basic needs to determine the total need.

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B-605 (Continued)

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- 4. Providing services to a recipient's creditors, such as assisting creditors in the collection of the recipient's debts.
- 5. Payments paid through the medium of a county trust fund or account, and by which the full amount of the warrant is not delivered to the recipient each month.

Services Performed in a Way Consistent with the Money-Payment Principle:

It is the manner in which service is given which determines whether or not the payment is restricted. Various services to recipients can be given in such a way that neither restricted payments nor restrictive practices occur. The following paragraphs describe the ways in which a number of services can be performed in a manner which harmonizes with the money-payment principle:

- 1. Furnishing information—Informing recipients of community resources provided the recipient, not the agency, decides how and whether resources will be used.
- 2. Referral and help in using resources—Referring recipients to other agencies and advising recipients how to use community resources are also proper agency functions. These referrals and the advice to recipients shall be given in such a way as not to conflict with the recipient's choice in the use of the payment.
- 3. Counseling-If advice and counsel about personal problems are given by an agency because the recipient wished it and if the agency worker deals with the problem in the same way as if it had occurred in a self-supporting family, no restrictive payment results. However, controlling the behavior of recipients is not an appropriate function of an assistance agency.

If authoritative action is found essential to protect the welfare of recipients or members of their families, the situation should be referred to the courts, or other appropriate enforcement agencies. The use by the public assistance agency of its power to provide or withhold assistance through threats or penalties associated with counseling results in restricted payments.

4. Personal services in which the agency acts for the recipient—Recipients who are infirm, bedridden, or otherwise incapacitated often request the help of the agency in selecting their mode of living and managing their resources. Such help may include, in a few instances and for a limited period of time pending the appointment of a guardian

B-612 (Continued)

B-612

shall be taken into consideration under the circumstances and within the monetary limits indicated.

1. Food—The amount by which the cost of special diet exceeds the cost of basic food (\$28.50) represents special need, and is to be computed in accordance with the department's Special Diet Schedule. (The "Special Diet Schedule" is prepared by SDSW and released to the counties as often as price changes require.)

If the circumstances require that the recipient eat his meals in restaurants, the cost in excess of basic food shall be \$21.40 a month.

2. Housing-If adequate housing is not available at less cost within the community, or if a health condition requires close proximity to a medical or shopping center, or if employment of the recipient or his spouse makes proximity to the place of employment a factor, special need exists as follows:

Rent--If rent, including no utilities, for a recipient living alone or living with someone other than a spouse, exceeds \$15, the amount in excess thereof, up to a maximum of \$25, represents special need. The basic allowance of \$15 plus \$25 results in a \$40 maximum for rent. If the recipient lives with an eligible or ineligible spouse, his share of the rental shall be considered to be no more than one-half of the total rental, up to a maximum of \$65 for the total rental. If his share exceeds \$15, the amount in excess thereof, up to a maximum of \$17.50, represents special need. The basic allowance of \$15, plus \$17.50 results in a \$32.50 maximum for the recipient's share of the rent.

If the rent, including utilities, for a recipient living alone or living with someone other than a spouse, exceeds \$21.30, the amount in excess thereof, up to a maximum of \$25, represents special need. The basic allowance of \$21.30 plus \$25 results in a \$46.30 maximum for rent, including utilities.

If a recipient lives with an eligible or ineligible spouse, his share of the rental, including utilities, shall be considered to be no more than one-half of the total rental, up to a maximum of \$71.30 for the total rental. If his share exceeds \$21.30, the amount in excess thereof, up to a maximum of \$14.35, represents special need. The basic allowance of \$21.30 plus \$14.35 results in a \$35.65 maximum for the recipient's share of the rent.

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Bul. 359 Restated

New

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B-609 (Continued)

The ANB basic continuing needs are valued as follows:

Food	\$28.50
Housing	15.00
Utilities	6.30
Clothing	6.20
Housing, Maintenance, and Replacement.	4.50
Transportation	4.50
Incidentals	10.00
Added Allowance for Blindness	10.00
Total	\$85.00

DB 359 Restated

The added allowance for blindness is required since the over-all cost of basic needs to a blind person is more than the cost to a person without such a handicap. Specifically, food and other commodities must be ordered by telephone and purchased at the nearest store, resulting in higher prices for these commodities. Also, the renovating and repair of clothing imposes an additional expense on all blind persons, especially the added dry cleaning service required and the additional amount that must be expended for the purchase of clothing.

There are many special needs which are often incident to blindness or unusual circumstances and which may be necessary to effect those physical, social, or economic adjustments required to promote the well-being of the individual blind person.

156-25 Restated

Needs in excess of the basic continuing needs shall be determined on the basis of the individual's circumstances, and to the extent that is required to cover factual and realistic needs. These needs must be determined with reference to the health, comfort, and well-being of the individual and not a family group.

In those instances where there is non-exempt income, including the value of currently used resources, there shall be recording in the case record concerning discussion with the recipient as to any special needs he may have, the amount required to meet them, and the determination with regard to the establishment of these needs. (See Sec. B-612, Special Needs-Definition and Determination.) (W&IC 3075, 3084, 3084.1)

B-612 SPECIAL NEEDS - DEFINITION AND DETERMINATION AND ONLY

B-612

Special needs are not common to all recipients, but an individual recipient may have need for one or more of them. The special needs listed below

B-612

- 4. Clothing--The cost of replacement of necessary clothing destroyed in a catastrophe such as fire, flood, etc., represents a special need.
- 5. Replacement or Repair of Worn-Out Household Equipment--Household furniture or equipment may be inadequate or substandard to a point where
 replacement or repair is necessary. The cost of replacement or repair
 of equipment essential to meet normal requirements represents special
 need if:
 - (a) the individual lacks and needs essential equipment,
 - (b) essential equipment is worn out and there is need to replace or repair it,
 - (c) essential equipment is lost due to such causes as fire or flood and there is a need to replace it,
 - (d) illness necessitates additional equipment.

When one or more of these circumstances exist allowance shall be made for replacement or repair not to exceed the minimum price for which the item is available through mail order houses or other stores of a similar character which are used, in general, by persons with low incomes.

Essential equipment for functioning of a household includes basic cooking and heating facilities, sleeping equipment, storage space for clothing, and other basic necessities for minimum comfort in living. Essential equipment also includes laundry equipment if laundry is done at home; refrigeration and air cooling equipment if found necessary because of climatic conditions. Such items as dishes or household linens are not included above since the replacement of those items is provided for under Household Maintenance and Replacements. (See Sec. B-609.)

The cost of repair of equipment already in use shall be weighed against the cost of purchasing a new refrigerator or laundry unit. Whether the equipment to be purchased should be used or new may depend upon the availability of such equipment with consideration given to upkeep as well as the initial cost. However, the case record shall contain a statement as to why a certain type of equipment was determined to be necessary.

Individuals shall be advised to discuss plans for repairing or replacing household equipment before making final arrangements. If the

Home Owned—If the recipient lives alone in his own home, and the monthly cost of prorated taxes, the required encumbrance payment (principal and interest) if any, \$2 monthly allowance for minor repairs and upkeep, and any net occupancy value, exceeds \$15, the amount in excess thereof, up to a maximum of \$25, represents special need. The basic allowance of \$15 plus \$25 results in a \$40 maximum for housing.

If the recipient lives in his own home with an eligible or ineligible spouse, his share of the housing cost shall be considered to be no more than one-half of the total up to a maximum of \$65 for the total housing cost. If his share exceeds \$15, the amount in excess thereof, up to a maximum of \$17.50, represents special need. The basic allowance of \$15, plus \$17.50, results in a \$32.50 maximum for the recipient's share of the housing cost.

If applicants or recipients are living in housing which does not come within the foregoing limitations, they shall be given a three-months' period in which to move to housing within the ceiling limit, to refinance the home property so that payments thereon may be reduced within the ceiling, or to make such other adjustments as may be possible. If, at the end of the three-months' period, no adjustment is made the grant shall be determined on the basis of allowance for special need as above specified.

If it is necessary to provide safe and healthful housing, or to minimize deterioration, the expense of occasional repairs the cost of which is \$10 or more, represents special need until allowance has been made for the cost of such repairs, provided the cost does not exceed the minimum for which such repairs can be secured. The plan for payment agreed upon between contractor or vendor and the recipient shall be recorded in detail.

3. Utilities—Special need exists if (a) the recipient's health is such as to require an abnormal consumption of one or more of the utility items, (b) the housing and/or equipment construction is such that an abnormal consumption occurs, (c) the utilities used include the more expensive items, such as butane, crude oil, wood and water when the rate in the community is unusually high, and sewer tax if included in the charge for utilities, (d) climatic conditions require the use of a greater amount of fuel. When the cost of such utility items used by the recipient under the foregoing circumstances exceeds \$6.30, allowance shall be made for them up to a maximum of \$17.80. (The basic allowance of \$6.30 plus \$11.50 results in a \$17.80 maximum allowance for utilities.)

(Section Continued on Next Page)

(d)

B-612 (Continued)

B-612

- (a) the individual has been evicted,
- (b) moving is necessary to obtain housing within the ceiling, as specified in Item 2, this section, or to effect an economy in rent,
- (c) moving is necessary to obtain housing which meets the need of the individual,
- (d) moving is necessary to obtain medical care or for reasons of health.

The amount allowed shall be based on the customary rate for such service in the community. The basis for the determination that an allowance for moving is necessary shall be recorded in the case record.

- 13. Storage of Household and Personal Goods—The cost of storage of household and personal goods represents a special need only where no other plan for such storage can be made and is temporarily necessary due to health or other reasons. The amount allowed shall be based on the customary rate for such service in the community. The reason for an allowance for storage shall be recorded in the case record.
- 14. Special Needs of Blind Persons—The following items represent special needs which may be necessary to effect physical, social, or economic adjustment of some blind persons. When it is established that there is need for one or more of these items, the actual cost thereof represents a special need:
 - (a) Personal services, such as a personal guide, reader, etc.
 - (b) Guide dog, and/or maintenance therefor. Experience with this type of need indicates that an allowance of \$29.00 a month for the maintenance of a guide dog (cost of food, veterinarian fees, etc.) is reasonable and this sum may be used in lieu of individual determination in each instance.
 - (c) Radio phonograph and/or radio phonograph repairs.
 - (d) Talking Book and/or Talking Book repairs.
 - (e) Typewriter and/or Braille writer.
 - (f) Artificial eyes.

B-612 (Continued)

B-612

recipient contracts for an item of household equipment without prior county concurrence with the plan, the unpaid balance of the cost, not to exceed the minimum price for which the item of equipment determined to be needed can be purchased, if it meets the above criteria, shall be included.

- 6. Transportation—If there is a transportation cost due to trips to the doctor, clinic, etc., or unusually long distance trips to the nearest shopping and business center, the additional transportation expense represents a special need, not to exceed \$10.50 a month. The basic allowance of \$4.50 plus \$10.50 results in a \$15 maximum for transportation.
- 7. Medical Care and/or Treatment Under Other Healing Arts--(See Sec. B-615, Medical Care Allowances.)

Sanitorium or Rest Home Care--(See Sec. B-615, Medical Care Allowances.)

- 8. Housekeeping Service—The cost of housekeeping service represents special need if the physical condition of the recipient is such that the service is required. This includes the cost of outside help to do occasional heavy cleaning, such as floors, woodwork, windows, etc., for persons who maintain their own household or live in a rented room where such service is not furnished without charge. The amount allowed shall be based on the customary rate for such service in the community.
- 9. <u>Laundry</u>—The actual cost of laundry service. not to exceed a maximum of \$5 a month, represents a special need if the recipient does not have facilities for doing the laundry himself or when his health or handicap prevents such activity.
- 10. Board and Room--If the recipient must pay board and room, and the charge for this item is in excess of \$65, the excess represents special need, provided board and room within the specified amounts is not available in the community.
- 11. Telephone—The cost of a telephone represents special need not to exceed \$4 a month.
- 12. Moving Costs—The cost of moving expenses represents special need only if no other moving arrangements or payment of cost is possible and if one of the following circumstances exists:

B-615 (Continued)

B-615

Determination shall be made of the monthly cost of prescribed drugs or medications and allowances shall be made to cover only the period for which needed. There shall be at least an annual redetermination with the recipient of the continued need for the medication. Such redetermination with the recipient shall include consideration as to whether or not the continued use of the medication has been prescribed. If medications are necessary on a continuing basis, and are purchased periodically, the cost is prorated on a monthly basis and the grant need not be adjusted in the month in which it is purchased.

D. Nursing Home, Sanatorium, or Rest Home Care

The cost of nursing home, sanatorium, or rest home care represents special need if the recipient's condition requires this type of care, as determined or recommended by his physician or practitioner. The maximum allowances for nursing home care, as set forth below, take into consideration the fact that the amount charged will vary according to the kind and extent of services needed by the recipient and according to conditions in various areas.

In order to determine which maximum will apply in a given case, the agency shall secure information from the physician or practitioner as to the kind of care required by the recipient. The nature of the services provided in the nursing home in which the recipient receives care or plans to receive care, and the rate charged shall also be determined. If, in addition to services usually provided, the nursing home also furnishes prescribed medications (prescriptions and proprietary drugs prescribed by physician) for the individual patient, special medical supplies and appliances required by the patient, or physician's services, and the rate is correspondingly higher, allowance may be made for these special needs in addition to the established maximum. Such allowance shall be based on the charge usually made for these services when provided through the nursing home. If the cost of prescribed medication, special medical supplies, appliances, or physician's services is not included in the nursing home rate, an additional allowance may be made based on the cost of the required item as reported by the recipient or other individual meeting the cost of the service.

If the physician or practitioner determines a recipient's condition requires placement in a private room, an additional amount, not to exceed \$50, may be allowed to meet the cost for the period this type of accommodation is necessary. If a recipient does not require a private room, but this is the only type of accommodation available, a three-months' adjustment period is permitted to enable the recipient to secure care in a ward or semi-private accommodation within the maximum cost allowed for the type of care he requires.

B-612 (Continued)

- B-612
- (g) Special appliances for the blind (including purchases and/or repair) such as white canes, watches, Braille slates.
- (h) Clerical assistance to supply essential reading and writing service.
- 15. <u>Debts</u>—Required payments on a debt represent special need if the debt is secured by the recipient's furniture or some other item of personal property which is a current necessity. The liquidation of debts not so secured represents a special need if the debt was for a bona fide special need and was incurred while a recipient of aid. Payments on an unsecured debt incurred while not a recipient of aid shall not be considered a current need. (WAIC 3075, 3084)

B-615 MEDICAL CARE ALLOWANCES AND ONLY

B-615

A. Definitions

Medical care as used in this section is defined as including services from physicians, dentists, and nurses, treatment given by a practitioner as defined below; clinic, convalescent and hospital care; drugs and medical supplies; surgical and prosthetic appliances; and other special services, diagnostic X-ray and X-ray therapy, as may be required for diagnosis, care and treatment.

If a recipient is under care or treatment by a physician or surgeon, or by the practitioner of any type of therapy, treatment by prayer or other spiritual means or other treatment recognized as a branch of the healing arts, the cost of such care or treatment represents a "special need" in the amount actually required to purchase such service.

B. Freedom of Choice and Purchase

The recipient is a free agent in the choice and purchase of medical care. After a person goes for treatment, what he actually needs and how much, is determined by the practitioner, medical or other, but he chooses what he will have or what he needs.

C. Medication

Prescription and proprietary drugs or other medications are considered special needs when (a) prescribed by a physician or practitioner of the healing arts, and (b) the cost is in addition to the charge for service.

B-615 (Continued)

B-615

F. Prepaid Medical and Hospital Care

If a recipient is enrolled in a prepaid medical care plan (e.g., California Physician's Service, Ross-Loos Medical Group, Permanente Health Plan) or in a prepaid hospital service plan (e.g., Blue Cross, Intercoast Hospitalization Insurance) or carries a disability insurance policy, the cost of the fee may be allowed up to a maximum of \$6 monthly. The three-month rule does not apply to care in a private hospital received under an insurance or other prepaid plan.

G. Nursing Service in Recipient's Own Home

If the provision of nursing service (either by a registered or a practical nurse) permits the recipient to continue living in his own home rather than requiring him to enter a nursing home, an allowance, not to exceed \$165 monthly, may be made for nursing service. An additional allowance, not to exceed \$30 monthly, may be made to cover cost of food for the nurse. If the nursing service is provided through a Visiting Nurse Association or similar organization (excluding public health nursing service of public health departments), the usual charge per visit shall be allowed instead. If only short-term nursing service is required (i.e., less that 15 days) cost of such service may be allowed in accordance with the usual community rate for such service.

H. Dental Care

The cost of dental care (i.e., extractions, fillings, treatment, X-ray examination, bridgework, dentures, and repair of dentures) shall be allowed.

I. Hearing Aids

If a practitioner of the healing arts recommends the provision of a hearing aid, the cost of the hearing aid represents a special need when a further examination by an otologist verifies that the recipient will benefit from its use. An allowance not to exceed \$10 shall be made to cover the cost of the examination by the otologist. An allowance not to exceed \$175 may be made to cover the cost of the hearing aid. An exception to the maximum allowance may be made when an otologist makes a specific recommendation that a recipient can benefit only from a type of hearing aid, the cost of which exceeds \$175. A maximum monthly allowance of \$5 shall be allowed to cover upkeep costs of hearing aids.

J. Supplementary Services Related to Medical Needs

The cost of items listed below represents special need if prescribed by a physician or practitioner.

B-615 (Continued)

B-615

Maximum allowances

Group I—The maximum allowance for nursing home care for recipients requiring only a minimum amount of care and service, i.e., board, room, laundry, including personal laundry, and some personal service or supervision, shall not exceed \$125. An additional allowance of \$20 shall be made to meet cost of clothing and incidental needs.

Group II—The maximum allowance for nursing home care for recipients requiring nursing service (rendered by registered or practical nurses), shall not exceed \$165. An additional allowance of \$20 shall be made to meet cost of clothing and incidental needs.

Group III—The maximum allowance for nursing home care for recipients who are bedfast and require extensive nursing care shall not exceed \$210. An additional allowance of \$20 shall be made to meet cost of clothing and incidental needs.

If the cost of care exceeds the maxima defined under Groups I, II or III, for the type of care required, a three-month adjustment period shall be permitted to enable the recipient to make plans to secure care at a cost within the allowable maximum. If the recipient remains under care beyond the three-month adjustment period at a rate exceeding the maximum for the type of care he requires, and the excess cost is met by income to the recipient, including contributions from relatives and direct payment by relatives or others, the amount of the grant shall be determined by applying all income to the maximum allowable cost of established special need.

Example: Mr. A. requires only the type of care provided under the Group II maximum allowance of \$165 (plus \$20 for clothing and incidental needs) or a total of \$185, but is currently receiving nursing home cars at a cost of \$200. Mr. A. has no additional special needs. Relatives contribute \$125 toward cost of care. There is no other income. When this amount is applied to the established total need (\$185) the grant is \$60.

If it is found that nursing home care cannot be secured within the maximum allowed under Groups I, II and III, the situation shall be submitted to the State Department of Social Welfare for review.

E. Private Hospital Care

While care in a private hospital is included in allowable medical care, it is limited, in general, to a three-month period. If a recipient enters a private hospital for medical or surgical care and the cost is met by income to the recipient, including contributions from relatives or county supplemental assistance, aid shall be granted for three calendar months next following date of admission. If, at the end of this period, the recipient continues to require care in the private hospital, the situation shall be reported to the State Department of Social Welfare for further consideration. Note exception under F, below.

B-618 (Continued)

B-618

- d. Number of visits monthly to physician or practitioner, date of last visit, number of visits during last two months, and cost per visit. Determination shall be made with the individual as to whether or not medications are furnished by physician or practitioner and included in his charge.
- e. Probable duration of need for care or treatment. Unless there is indication that care will be continuous, a plan shall be made with the individual for redetermining medical care needs periodically and as often as indicated by the situation. (Warc 3075, 3084)

B-621 COMPUTATION OF TOTAL NEED ANB ONLY

B-621

If an applicant or recipient is in receipt of non-exempt income, Form Temp. 158 Bl, Computation of Total Need and Aid Payment, shall be used to compute total need and the amount of the aid. The left half of the form is used for exploration of the applicant's or recipient's special need, and to record the cost of items of special need as well as of those items of basic need which represent a special need. The right half of the form is used to record the cost of items of special need as well as of those items of basic need which may amount established for individual items of special need, and to record the amount of total need.

The bottom of the form under "Summary" contains appropriate spaces to record total income on the left side and the computation of the aid payment on the right side.

Example 1: The recipient is paying \$45 rent, which includes utilities, and it is inadvisable for him to move because of the necessity for close preximity to a shopping center. His telephone costs \$4 a month. Due to his handicap, he must pay \$7 a month for laundry and \$7.50 a month for house cleaning service. He receives \$45 OASI income, \$5 from stock dividends (non-exempt), and \$40 from earnings (exempt).

Total Needs			Income	
Basic continuing n Excess rental (\$45 Laundry Telephene Housekeeping Tetal		\$ 85.00 23.70 5.00 (max.) 4.00 7.50 \$125.20	OASI Stock dividends Earnings Total Non⇒exempt	\$45.00 5.00 40.00 (exempt) \$90.00 50.00
Total needs Non-exempt income Grant	\$125.20 50.00 \$ 75.20			

B-615 (Continued)

- a. Laboratory service, X-rays.
- b. Eyeglasses (including charge for refraction).
- c. Trusses, and other prosthetic appliances.
- d. Dressings and other sickroom supplies, including wheel chairs, hospital beds, crutches, etc. (Waic 3075, 3084)

B-618 VERIFICATION OF SPECIAL NEEDS AND ONLY

B-618

B-615

Emphasis must be placed upon recognition of special needs which exist. Allowance shall be made for special needs in determining the total need of the applicant or recipient on the basis of his written or oral statement when the amount needed to meet the special need appears reasonable. Verification is required when the cost as reported by the recipient appears to be excessive.

In instances where the applicant or recipient cannot give a clear picture of the situation as to the cost of required medical service, care or treatment or the probable duration of the need, further verification through the physician or other practitioner is indicated. Such clearance shall not be made, however, without the consent of the applicant or recipient nor without his written authorization to the physician or practitioner.

In some cases, medical care needs and resulting costs are unpredictable because of the nature of the health problem. The individual should be given a full interpretation of his responsibility in reporting information regarding changes in his medical care situation. If medical services or other treatments are not given on a regular, continuing basis, and the amount of care required varies month by month, allowances for these costs shall be determined as often as required.

When determining medical care needs of an individual who is under the care of a physician or practitioner, the following information shall be secured through discussion with the recipient and recorded in full in the case record:

- a. Name and address of physician or practitioner.
- b. Nature of illness.
- c. Length of time he has been under the care of the physician or practitioner.

, .	mical Lagibrau	e a suare il cenera in nouse	eno ide	ulds costs plus the company value, if any.
		ane Brown		200 March 3 1951
		TOTAL INCOME	34.60	
				Difference Between Heed and Income 63.90 Amount of Aid Recommended 63.90
her_	0951		31.60	Total Incom. 34.60
	alue of Occupan	noy, If Any	3.00	Total Need 98.50
	SOURCE		AMOUNT	and culture
		INCOME	SUMM	COMPUTATION OF AID PAYMENT
		• • • • • • • • • • • • • • • • • • • •		98.50
	The second second second	coause of Bliningss? No		If Yes, Amount (Explain Pully in Record)
	Specify		_	Why necessary?
	Housekeeping S	ervice	0	Reason: Health Blindness Isolation
	Telephone	***************************************		Amount Allowed (Must not Exceed Maximum)
	Laundry		0	Amount Allowed (Must not Exceed Maximum)
				Sanitarium CostAllowable Excess (3) Nursing Care CostAllowable Excess (3)
	Hand Column)			Glasses, Dentures, Etc., Specify
		ete Appropriate Items in Ri	lght	Prescriptions, Drugs, Etc
•	Medical Care	No Yes	••••••••	M.D. er Other, Per Month
		5 5		
				(Sor, rage 4, transportation;
		for, and How Cost Determin		(See Bulletin 359, Page 4, Transportation)
5.	Transportation	100000000000000000000000000000000000000	Frie	Amount of ExcessAllowable Excess (3)
5.	Board and Room			.Amount of Excess
		Other Total	(2)	Amount of ExcessAllowable Excess (3)
		Water		Reason
١.	Utilities	Gas		If Special Need is Allowed for Utilities State
	TOTAL	+ Occ. Val	(1)	Amount of Excess
	Upkeep			\$9.50 Sentil 12/31/51.
	Enoumbrane			monthly installments of
	Insurance			cost lof # 95.00 payable in 10
	Taxes			Specify Nature of Repairs, How Cost Determined
•		pense for Repair? NO	YES	7,00
2.	Own Horse	names for Bonstine up [V20 🗔	Why Excess Necessary?
		THOUMAND DATE AND ASSESSED.		Amount of Excess
		Not including Utilities		
	Rent	Including Utilities		Amount of Excess (See Bull 359, Page 3, Housing)
1.	Food T		rant Meals France	Amount of Excess
		Items of Special Need	Actual Cost	Amount of Special Need Established
Ba.s:				1 • • • • • • • • • • • • • • • • • • •
	If Yes, Nu	mber in Household	Yes No	State No. 123 County No. 1780
	Living as	a Member of a Household Gro	pup	Case Name John Lac
		COMPUT	ATION OF TOTAL	NEED AND AID PAYMENT
		COMPAN		
			ATD TO M	EEDY BLIND

B-621 (Continued)

B-621

Example 2: An ANB recipient has a monthly income of \$31.60 from CASI and \$3 from value of occupancy. His special need has been \$4 for medicine, making his total need \$89 a month. In March, he contracts to have the roof of his house repaired at a cost of \$95 to be paid in 10 monthly installments of \$9.50 each. The recipient's total need will be \$98.50 for the next 10 months, if there is no other change in his need, and during that period the grant will be \$63.90 a month (\$98.50 minus \$34.60 non-exempt income).

The completed Form Temp. 158 shall be filed in the case record. The circumstances which justify allowance of special needs shall be recorded on the form, or in the case narrative. (W&IC 3075, 3084)

B-624 (Continued)

B-624

Example: Application signed September 6, granted by board of supervisors February 6. As the 90-day period ended December 5, aid is paid from December 1.

- 4. If an application for aid has been improperly denied and such action is later rescinded, aid shall begin effective the date aid would have begun had there been no denial action. (See Secs. B-140, When Application to be Taken, and B-630, Retreactive Aid Payments.)
- 5. Aid shall begin effective the date specified by the SSWB in an order awarding aid.

The beginning date of aid shall not antedate the signing of the application. Exception: If the recipient transfers from one county to another, the beginning date of aid in the second county may antedate the signing of the application in the second county.

If a recipient transfers from OAS to ANB or APSB, or from ANB, APSB to OAS, aid may begin effective the first day of the month following the month in which such transfer of aid was approved by the board of supervisors. This provision is designed to avoid undue delay in the transfer of aid from one category to another, and to prevent duplication of such aid.

If eligibility was established only from a date subsequent to the date when aid should have been effective, aid shall not be granted prior to the date on which the applicant became eligible as established by the investigation. If it is indicated that aid should begin from the first of the month preceding that in which the board of supervisors grants the application, but because of ineligibility of the applicant during one or more of such months, retroactive aid is not paid, a statement of the specific reasons for the applicant's ineligibility for such payment shall be made on the Certificate of Eligibility, Form Bl 201.

If eligibility is dependent upon medical evidence (physician's examination), the condition described in such evidence shall be considered to have existed from the first of the month in which the medical examination is made.

B. Restorations

The effective date of restoration of aid is determined as follows:

If aid has been discontinued for any reason and request is made for restoration before the expiration of one year, determination of eligibility shall

(Section Continued on Next Page)

611-50 Restarted

B-624

B-624 BEGINNING DATE OF AID

A. Applications

The beginning date of aid on applications is determined by law as follows:

1. Aid shall begin effective the date the application is signed if the application is granted by the board of supervisors in the same month in which the application is signed.

Example: Application signed September 6, granted by board of supervisors September 21. Aid begins September 6.

2. Aid shall begin effective the first day of the month in which the application was granted by the board of supervisors if the application was signed in a previous month and 90 days or less have elapsed between the date the application was signed and the date aid was granted by the board of supervisors.

Example: Application signed September 6, granted by board of supervisors November 16.
Aid begins November 1.

3. If the determination of eligibility is not completed by action of the board of supervisors within 90 days from the signing of the application, and aid is granted on the 91st or some subsequent day, aid shall begin effective the first of the month during which the 90-day period ends.

The day following that on which the application is signed represents the first day of the 90-day period. If the 90th calendar day falls on a Sunday or legal holiday, the following day is considered the 90th day. The date on which the board of supervisors acts on the application is the day on which the determination of eligibility is completed.

B-627 (Continued)

B-627

- (1) The total amount of income from this source may be determined for each three-month period. Any necessary adjustment in the grant may be made in the first or not later than the second month following the end of the three-month period, for which the amount was determined.
- (2) The total amount of income from this source may be determined for the ensuing twelve-month period and the monthly average thereof taken into consideration in making any necessary adjustment in the monthly grant. (Walc 3075, 3460)

B-630 RETROACTIVE AID PAYMENTS

B-630

Retroactive aid means aid paid in a subsequent month for some preceding month or months. All payments of aid shall be made within the month for which aid is granted except that retroactive aid shall be paid by the county in the following types of situations:

- 1. If retroactive aid is granted upon appeal to the SSWB or if the SDSW concurs in the county's recommendation that the appeal be adjusted by payment of retroactive aid without hearing by the SSWB.
- 2. If retroactive initial payments are due because the determination of eligibility exceeded the period allowed by law. The action of the board of supervisors may be an original action on the application or a subsequent action to correct the original action where it is found that the beginning date originally established was not in accord with the legal provisions.
 - Example: An application which was signed on July 15 was approved by the board of supervisors on September 15, aid to start effective October 1. On October 25 the county discovers that aid should have been effective September 1, according to the provisions of W&IC Sec. 3082. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1.
- 3. If an authorized award is in effect, but through error no payment is made, <u>and</u> the payment due is made within a three-month period, including the month in which no payment was made. No further action by the board of supervisors is necessary.

(Section Continued on Next Page)

361-25 Restated

11-70

B-624 (Continued)

B-624

be made and if eligibility is established, aid shall be restored not later than the first day of the month immediately following the date of such request.

If a former recipient, whose aid was discontinued for any reason, requests restoration of aid in another county of residence than that in which aid was discontinued, a new application (Form Bl 200) shall be signed and the county shall have the 90-day period in which to determine eligibility as in other new applications.

C. Initial Payments

Initial payments are the first payments made on new applications and restorations.

Initial payments of aid shall be made within the month for which such aid is granted or not later in the following month than the time when such payments would normally be issued under the county's customary fiscal procedure, except in the instances listed in Sec. B-630. (See Sec. B-636, Suspension Procedure.)

If aid begins on the first day of a month, payment shall be made for the full month. If aid begins during a month, the initial payment shall cover only the portion of the month for which aid is granted, including the beginning date. (W&IC 3075, 3078, 3082, 3084, 3460, 3472, 3475)

B-627 CHANGES IN AMOUNT OF AID

353-20 Restated

B-627 Restated d of Because an individual's need or income is subject to change, a method of adjusting the grant is necessary. The Notice of Change, Form Bl 232, is used by the county to effect an increase, decrease, discontinuance, or restoration of aid. Any change in aid shall be made as soon as administratively possible.

The amount of aid shall be changed whenever it is determined that the authorized payment is not in accord with the amount which the individual is entitled to receive. (See Secs. B-630, Retroactive Aid Payments and B-633, Decrease in Amount of Aid.)

If monthly interest payments in decreasing amounts (which have not been determined an inconsequential resource) are received, either of the two following methods may be used for adjusting the grant:

B-630 (Continued)

B-630

- 10. If the SDSW concurs in a county recommendation that retroactive aid be paid or if the county concurs in a SDSW recommendation that retroactive aid be paid in appeals involving degree of blindness.
- ll. If payment was made in conformity with the authorized award but the county subsequently determined that the recipient was eligible for a greater amount, the county shall grant retroactive aid provided the board of supervisors can authorize the additional amount due before the end of the second month following that in which the underpayment occurred.

The elapsed time may be such that the county cannot authorize the additional amount due before the end of the second month following that in which underpayment occurred. Under these circumstances, the county may grant the additional amount due without the necessity of appeal or SDSW concurrence provided the board of supervisors can authorize the additional aid before the expiration of one year, including the month in which the recipient was underpaid. (See Sec. B-752, Federal Participation.) (Walc 3075, 3078.5, 3460; AGO NS 4670)

B-633 DECREASE IN AMOUNT OF AID

B-633

Under certain circumstances, adjustment for overpayment is made by an appropriate decrease in the grant if the recipient remains otherwise eligible. Such decrease shall be made as soon as administratively possible after the necessity for such adjustment becomes known, but in no event may the decrease be effective later than the second month following that in which the overpayment occurred.

A. Overpayment Due to Income (and/or Change in Total Need in ANB)

1. If income (and/or a change in total need in ANB) of the recipient causes the amount of the grant, together with the income, to exceed the amount to which he is eligible the adjustment shall take into consideration the non-exempt income (and total needs in ANB) plus all overpayments which occurred, during the two preceding months.

Example: In December the county discovers that an ANB recipient secured steady work earning \$65 in November and thereafter. Total monthly need in November and December \$85. The recipient was eligible in November and December to \$70, (\$85 less \$15) but received \$85, resulting in a \$15 overpayment in each of these months. In January the need is \$85 and income continues at \$65. Aid is reduced effective January 1 to \$40 (\$85 less \$30 overpayment in November and December and \$15 income in January). \$15 of the earnings are non-exempt and deductible.

(Section Continued on Next Page)

361-10 Restated

B-630

- 4. If a payment in a particular month is made for less than the authorized award for that month, and the additional payment due is made within a three-month period, including the month in which the erroneous payment was made. No further action by the board of supervisors is necessary.
 - Example: The authorized award for a recipient for October is \$75. Due to an error, the recipient was paid \$60 for October. County shall pay recipient additional \$15 due for October in November or not later than December 31.
- 5. If an award has been made and remains in effect, but payment of aid is suspended as provided in Sec. B-636, Suspension Procedure, and subsequently, eligibility to the suspended warrants is established.
- 6. If a warrant is returned to the county auditor's office because of a change in the address of the recipient, such warrant shall be transmitted to the recipient's new address as soon as possible in the current month or within the two subsequent months following that for which the warrant was issued.
- 7. If aid is continuous and there is a change of payee, the warrant shall be delivered to the new payee as soon as possible in the current month or within the two subsequent months following that for which aid is granted.
- 8. If, in a transferred case, the second county fails to begin aid on the date due. To avoid interruption in receipt of aid, the second county shall pay retroactive aid.
- 9. If it is determined that the previous action of the board of supervisors was erroneous, the board of supervisors shall rescind and correct its previous action under certain circumstances and limitations as follows:
 - a. Rescission of denial action of an application. (See Sec. B-140, When Application to be Taken.) The rescinding action must be taken within one year from the date of the action which is being rescinded. The beginning date of aid is then determined on the basis of the elapsed time between the date the application was signed and the date of the action granting the retroactive aid due.
 - b. Recission of an erroneous action discontinuing aid. The rescinding action must be taken within one year from the date of the action which is being rescinded and retroactive aid granted from the first of the month following the effective date of the erroneous discontinuance.

B-633 (Continued)

B-633

Example: The county discovers on December 16 that an ANE recipient's property totaled \$1212 since July 1. Fraud existed because the recipient admitted he did not report the change in his circumstances as he did not wish the grant of \$20 stopped. By January 1 the property is reduced within the amount allowable. Total need in January, the month of adjustment, is \$85 and the recipient has \$15 income from a son in that month. He would be entitled to receive \$70 were it not for the overpayment due to excess personal property. Adjustment is in order for the full amount of aid paid in November and December (\$40) and the grant effective January 1 is reduced to \$30 (\$70 - \$40). (The unadjusted remainder of overpayment for the period July 1 through October 31, is subject to collection under provisions of Sec. B-672, Repayment of Aid:)

If the discovery of the excess property occurs too late to make the adjustment effective not later than the second month following that in which ineligibility existed the right exists to request repayment under Sec. B-672.

2. Overpayment Due to Mistake of Fact—The grant is adjusted by deducting the largest amount by which the property exceeded the legal limitation during the two months preceding the month of adjustment or the amount of aid received, whichever is the lesser, from the amount to which the recipient would otherwise be entitled in the month of adjustment. If the discovery of excess property occurs too late to make the adjustment effective not later than the second month following that in which the overpayment occurred, there is no right to request repayment.

Example: During November, county discovers that recipient was ineligible to ANB on October 1, as total value of his cash and securities was \$1227. This value remained the same on November 1, but during November was reduced within the amount allowable. Recipient's regular monthly income was \$15, total monthly need in October and November \$100, and he received the maximum grant of \$85. Although recipient was ineligible in both October and November, the overpayment was not due to fraud and adjustment is in order only for the excess of \$27. On the basis of income alone recipient is entitled December 1 to \$85 ANB. Since the excess property is not applicable toward unmet need, it is deducted from the grant to which he would otherwise be eligible. The grant for December is, therefore, \$58 (\$85 less \$27 excess property).

C. Overpayment Due to Reason Other Than Income or Excess Property-If overpayment has occurred for reason other than income or excess property, and the circumstances have so changed that the recipient is eligible to receive aid in the month of adjustment, the grant to which there would otherwise be eligibility in that month is decreased to the extent of the overpayment occurring within the two months preceding the month of adjustment.

If the ineligibility was discovered too late to make the adjustment effective not later than the second month following that in which ineligibility existed, there is no right to request repayment if the delay in discovering the ineligibility was due to mistake of fact. If the delay was due to fraud, request for repayment to the extent of the aid paid during the months of ineligibility would be in order under Sec. B-672, Right to Request Repayment of Aid. (WAIC 3075, 3084, 3460, 3472; AGO NS 4473)

B-633 (Continued)

B-633

- A decrease in the grant (or a cash adjustment by means of a refund from the current income including the grant to which the recipient is currently eligible) shall not be made because of income received prior to the second month preceding the current month. If the overpayment is discovered too late to adjust the grant within this time limit, and the delay in discovering the income was caused by fraud, request for repayment from resources other than the income including the current grant is in order under Sec. B-672, Right to Request Repayment of Aid. If the exact amount of income for a given month is known in advance, any necessary decrease in the grant shall be made for the month in which such income is expected to be received.
- 3. If the total income for a given month can be determined only during the month in which it is received, or during the subsequent month, any necessary decrease in the grant shall become effective not later than the second month subsequent to that in which the income is received.
- 4. If the income is irregular and cannot be foretold, adjustment by means of a refund may be made within the current adjustment period, in lieu of decreasing the grant.

Example: A single ANB recipient having no income and no need in excess of \$85 a month secures employment in October. The county ascertains on October 15 that he was paid \$65 which represented net income. (Of this income, \$50 is exempt.)

Adjustment may be made in either of two ways, i.e.:

1. Decrease in aid effective November first or not later than December first:

or

2. Repayment by the recipient of \$15 in November or December.

B. Overpayment Due to Excess Personal or Real Property

If real or personal property has exceeded the legal limitation during the current adjustment period but has later been reduced within the maximum, thus making the recipient eligible to continued aid, the grant is decreased within the current adjustment period as follows:

1. Overpayment Due to Fraud--The grant is adjusted by deducting the amount of aid paid during the one and/or two months preceding the month of adjustment from the amount to which the recipient would otherwise be eligible in the month of adjustment.

B-636 (Continued)

B-636

for the specified month be withheld. The specific reason why eligibility is questioned shall be recorded on the notification to the auditor, a copy of which shall be retained in the county case record. Counties may devise their own form for notification to the county auditor.

If eligibility is determined, two copies of a notification prepared in triplicate shall be forwarded to the county auditor requesting release of the warrant for the particular month. One copy shall be retained in the county file. A statement covering the results of the determination which justified release of the warrant shall be included in the case record, either in the narrative or on the notification to the county auditor. Upon release of the suspended payment, the auditor shall indicate on the second copy the date of release of the warrant, sign it, and return it to the county welfare department where it shall be filed in the county case record. Board of supervisors' action is not required to release a suspended warrant.

If factors beyond the control of the county delay the receipt of information necessary for a determination regarding eligibility, the warrant for the second month shall be issued but delivery withheld while determination is continued. Such situations may be due to failure to receive replies from persons or agencies in another locality, to the physical condition of the recipient, etc. A notice shall be forwarded to the county auditor specifying the particular month for which delivery of the warrant is to be withheld and a copy of this retained in the county case record. If necessary, delivery of this warrant may be withheld beyond the month for which it is issued and further suspension action by the board of supervisors is not required.

In extreme cases, delivery of the warrant for the third month may also be withheld. If the determination has not been made by the last day of the third month that the recipient is eligible, the warrant for the third month, together with the warrants for the two previous months, shall be canceled, and Notice of Change, Form Bl 232, reporting discontinuance of aid, effective the last day of the month immediately preceding the first suspended payment, shall be submitted to the SDSW.

If eligibility is established during the second or third month, the usual notification to the county auditor shall be forwarded in duplicate, requesting that the withheld warrants be released. The auditor shall return one copy to the county welfare department after indicating the particular warrants which were released and the date of release. In no case may the warrants be released later than the last day of the third month.

B-636 SUSPENSION PROCEDURE

Suspension is the process whereby delivery of a warrant is withheld beyond the month for which the warrant was issued while circumstances which raise question regarding the recipient's continued eligibility are investigated. Aid shall be suspended by the county if eligibility is questionable, except that an initial payment may not be suspended. Upon completion of the determination of eligibility payment may not be suspended. Upon completion of the determination of eligibility payment may not be suspended. Upon completion of the determination of eligibility payment may not be suspended. suspended warrants are either released to the recipient or canceled. (Discontinuance of aid differs from suspension in that aid is discontinued only if the information establishes ineligibility for continued aid.) The recipient shall be notified immediately of the county's action, the reason, and his right of appeal.

Action authorizing the suspension of aid shall be taken by the board of supervisors not later than the first meeting of the month following that for which delivery of a warrant is withheld. Exception: If the county welfare department establishes eligibility prior to the first board of supervisors' meeting of the month following that for which delivery of a warrant is withheld, the warrant may be released without the necessity of board action authorizing the suspension of aid, provided the warrant is delivered on or before the date of such board meeting.

Upon request of the SDSW, an immediate report of every suspension of aid shall be made. Such report shall state the reason for the suspension, the date on which the board of supervisors approved the suspension, and the progress made toward establishing eligibility. If it appears upon inquiry that the aid has been obtained improperly, it shall be canceled by the SDSW; and if it appears that aid was obtained properly, the suspended payment shall be payable.

If delivery of a warrant has been withheld but eligibility is subsequently established and the warrant is delivered on or before the last day of the month for which it is issued, suspension action is not necessary.

Aid shall not be discontinued or suspended upon receipt of a Physician's Report of Eye Examination (Form Bl 227) which raises question as to the degree of blindness. The procedure outlined in Sec. B-259, Procedure When Eligibility on Degree of Blindness is Questioned, shall be followed.

If information which raises question regarding continued eligibility makes it advisable to withhold delivery of the warrant for a particular month, determination of the eligibility question which caused the suspended payment shall proceed promptly and with all diligence in order that eligibility for continued aid may be established at the earliest possible date. In such cases a notice shall be forwarded to the county auditor requesting that delivery of the warrant

B-642 ADJUSTMENT IN AMOUNT OF AID APSB ONLY

B-642

Adjustment in the amount of aid shall be made when the annual income of the recipient from exempt sources exceeds \$1,000 within a one-year period.

(See Sec. B-542, Exempt Income in APSB.) Adjustment shall be made by deducting from the grant, one-half of the amount of such income which is in excess of \$1,000 per year.

If the income for a given year or for any number of months thereof can be determined before the close of said yearly period, any necessary adjustment of the grant shall be made for the month in which the income exceeds the annual allowable exempt income, but shall not be made later than the second month following that in which the income exceeds the maximum allowed. If the excess income is larger than the amount of aid for the month, discontinuance of aid for the month adjusts for the excess income.

If the income for a given year can be determined only after the close of said yearly period, an adjustment as indicated above shall be made as soon as administratively possible, but shall be effective not later than the second month following that in which the income exceeds the maximum allowed.

If income which should have been considered in determining the grant is discovered too late to adjust the grant effective not later than the second month following that in which the income was received, the recipient shall be requested to reimburse the county from resources he may have other than the income, including the grant to which he is currently eligible. The reimbursement requested shall not exceed the amount of aid paid to which the recipient was ineligible.

The following rule determines the yearly periods, in each of which the exemption of income is allowed: (See Sec. B-542.)

The first one-year period begins as of the first of the month in which payment of APSB begins (unless a yearly income period had previously been established) and includes such first month, together with the eleven subsequent months. The next succeeding yearly period begins on the first day of the thirteenth month of aid and covers the thirteenth to twenty-fourth months, inclusive, etc. In any case in which aid has been discontinued for more than one year, the yearly income period begins with the first of the month in which APSB begins on reapplication.

Following are examples showing how the exempt income clause is applied in APSB:

B-636 (Continued)

If an authorized award is in effect but delivery of two or more warrants is withheld under the provisions of this section, while determination of eligibility is made, it will sometimes be established that the recipient was ineligible to certain of the suspended warrants but eligible to the others. The warrant or warrants to which the recipient is found ineligible shall be canceled and such cancellations shall be reported to the SDSW.

If aid continues, the cancellation of an interim suspended warrant does not result in an interruption of the authorization for payment of aid. The authorization has been continuously in effect and, therefore, aid is not discontinued by a canceled payment. The delivery of a warrant for the month following the period covered by the canceled suspended warrant or warrants does not represent restoration. The Notice of Change (Form Bl 232) showing board of supervisors action shall be used to report to the SDSW the month or months for which the suspended payments were canceled together with the reason. Only those payments which are canceled under the circumstances described in this section shall be reported in this manner. (WaIC 3075, 3078, 3078, 3078,5, 3460)

B-639 CHANGES IN AMOUNT OF AID DURING SUSPENSION

B-639

If it is found, during the suspension of aid, that the recipient was eligible for a lesser amount of aid than that for which the suspended warrant or warrants were issued, the original warrant and any other suspended warrants may be paid and a repayment sought from the recipient for the amount in excess of that to which he was eligible, or the original warrant and other subsequently suspended warrants may be canceled and a new warrant or warrants in the correct amount issued. (See Sec. B-633, Decrease in Amount of Aid.) If the original warrant and any subsequently suspended warrants are canceled and a new warrant or warrants issued, the board of supervisors must approve the changed grant and the new warrant or warrants must be issued before the end of the suspension period.

If, during suspension of aid, it is determined that the recipient was eligible to a greater amount of aid than that for which a suspended warrant or warrants were issued, the original warrant or warrants may be released. The additional amount due for a particular month may be retroactively paid, or the original warrant may be canceled and a new warrant or warrants in the correct amount issued. (See Secs. B-630, Retroactive Aid Payments, and B-627, Changes in Amount of Aid.)

(WAIC 3075, 3078, 3078.5, 3460)

361-35

In linewith Sec. 361-25

B-648 (Continued)

B-648

necessity for discontinuance becomes known. If the ineligibility is not discovered by the county in time to discontinue the aid not later than the last day of the month following that in which the ineligibility occurred, aid shall continue if the recipient is otherwise eligible.

If the disqualifying facts are discovered too late to discontinue aid effective not later than the last day of the month following that in which the ineligibility occurred, or when the discontinuance does not totally adjust the overpayment, right of collection exists only if there is fraud. (See Sec. B-672, Right to Request Repayment of Aid.)

If the amount of overpayment is equal to or greater than the amount of the grant to which the recipient would otherwise be eligible in the month of adjustment, aid shall be discontinued for one month. (If the amount of the overpayment is less than the amount of the grant to which the recipient would otherwise be eligible in the month of adjustment, aid shall be decreased to the extent of the overpayment.)

Adjustment for Overpayment—If a delay in discovery of the ineligibility makes it impossible to discontinue aid effective the last day of the month in which there was ineligibility, but discontinuance of aid for an otherwise eligible recipient is effective the last day of the following month, the discontinuance adjusts for overpayment during the two months preceding the month of adjustment, i.e., the month for which aid is discontinued, to the extent of the amount of aid to which the recipient was eligible in the month of adjustment. Any unadjusted remainder of the overpayment is subject to repayment under the provisions of Sec. B-672 only if the overpayment was due to fraud.

Example: On November 15 the county learns that an ANB recipient earned \$150 in October and \$60 in November. He received \$85 aid in each of those months. Aid is discontinued effective November 30 and restored effective January 1. The recipient's total need both in October and November was \$90. In December his need was \$85 and in that month he began receiving a contribution of \$5 from his son, leaving an unmet need of \$80 in December. The \$90 overpayment is adjusted to the extent of \$80 and repayment of \$10 shall be requested if the recipient committed fraud. If he has no resources other than his income including the grant to which he is currently eligible, repayment may not be required until and unless the recipient at some future time is possessed of resources from which repayment can be made.

Discontinuance of aid is effective as of the last day of the month for which the last warrant was delivered. (Walc 3075, 3078.5, 3084, 3460, 3472; AGO NS 4473)

B-642 (Continued)

B-642

- Example 1: A recipient whose APSB grant began in April has the following monthly income: earnings, \$75; value of use and occupancy of own home, \$7; total monthly income, \$82, or total income during the 12-month earning period, \$984. The recipient receives aid in the amount of \$85 for the 12 months because during the 12-month period from April 1 to March 31 his total exempt income did not exceed \$1000.
- Example 2: A single recipient whose APSB grant began in April has the following monthly income: earnings, \$95; value of use and occupancy of own home, \$5; net income from rental of real property, \$25; value of foodstuffs produced by recipient, \$5; total monthly income, \$130 or total income from April through November 30 (8 months) \$1040. Since income for December was predictable, the grant is discontinued for that month. The reason for this discontinuance is: In November, recipient's income reached a total of \$1040, and since this was \$40 in excess of \$1000, one-half of this excess or \$20 should have been deducted from the November grant. This is adjustable for the December grant. In December, recipient's income is known in advance to be \$130, of which \$65 is deductible. This makes a total adjustment of \$85 for December, resulting in the discontinuance of the grant for that month. In January, recipient will be eligible for restoration, and if his income continues to amount to \$130 monthly, he will be entitled to a grant of \$20 a month until March 31. This is obtained by deducting one-half of \$130 or \$65 from the maximum grant of \$85. On the following April, his anniversary date, his income remaining the same, he would again be eligible to receive aid in the amount of \$85 monthly until the maximum allowable income has again been reached.
- Example 3: A recipient, with an ineligible spouse, whose only exempt income is his earnings of \$150 per month and the value of use and occupancy of his own home which is \$5 (total monthly income, \$155) begins in January to receive aid in the amount of \$85 per month. In July his total income for the first seven months amounts to \$1085. During this month his earnings have exceeded the \$1000 limitation. However, since he has a spouse whose income is insufficient to meet her needs, he is permitted to allocate up to \$1000 of his income during the year toward her support. Therefore, his grant will continue in the amount of \$85 for the balance of the 12-month period, assuming his income from exempt sources remains the same, and his wife continues to be in need. (W&IC 3460, 3472)

B-645 CHANGE IN ELIGIBILITY STATUS DURING MONTH

B-645

If a recipient is eligible on the first day of the month, but eligibility status changes at some time during that month for any reason, no overpayment occurs if aid is discontinued at the end of that particular month.

Example: A recipient received \$85 on December 1. On December 5 he received \$400 cash through inheritance which caused his personal property holdings to exceed \$1200. Aid is discontinued December 31. No repayment is due. (W&IC 3075, 3084, 3460, 3472)

B-648 DISCONTINUANCE OF AID

B-648

If the recipient is no longer eligible, aid shall be discontinued. The discontinuance shall be effective as soon as administratively possible after the

(Section Continued on Next Page)

Restat

Restated Repeated Similar

B-654 AID PAYMENTS - GENERAL

B-654

610-20 Restated

610-50

510-40

A. Issuance of Warrants

Payments of aid shall be made by county warrant monthly in advance, on or as near to the first day of the month as possible, and all warrants shall be clearly marked to show the date of issuance. The payee's name shall appear on the warrant exactly as his signature appears on the application, Form Bl 200, or on the Summary of Letters of Guardianship, Form DPA 5. Exception: If the county's disbursement procedures make it difficult to use the full first name, the initial only may be shown on the warrant. If a guardian is the payee, Form DPA 5 shall be on file in the case record. The guardian's name shall appear on the payroll together with the name of the grantee.

Enclosures with warrants are restricted to those matters relative to the administration of the program to which the warrant refers. Any other material which a county may desire to enclose with a warrant requires prior SDSW approval.

B. Time Limit on Warrants

Any warrant issued in payment of aid and payable to the recipient, guardian, trustee, disbursing agent, or any custodian of the recipient's funds or estate is void if not presented to the county treasurer for payment within six months after its date. Every aid warrant shall carry notice of this fact conspicuously on its face in order that persons holding such warrants will present them for payment within the time limit specified. The following wording is recommended: "This warrant is void if not presented for payment within six months from date." The warrant issue date shall not be counted in computing the last day of the six-month period. If the last day falls on a Sunday or a legal holiday, the day following is considered to be the last day.

Any claim arising from a valid authorization to pay aid resulting in the issuance of an aid warrant becomes void on the same date as the warrant. (Gov. Code 29802, AGO 49/242)

C. Reissuance of Warrants

Whenever a warrant has been lost or destroyed before it is paid by the county treasurer, the amount due may be recovered by the payee by filing with the auditor prior to the time the warrant becomes void an affidavit setting forth the fact of the loss or destruction of the warrant, the number, date, amount,

If a former recipient, whose aid was discontinued for any reason, requests restoration of aid within twelve months of the date of discontinuance, no new application shall be taken. If the request for restoration is made in person. a written statement containing such request shall be signed by the former recipient and the date of the request indicated. If any other oral request, by telephone or otherwise, is made, the date of such request shall be entered in the case record. If the request is made by letter, the postmark shall be considered the date on which the request is signed. Exception: No signed request for restoration is required if the automatic restoration procedure described in this section is used or if adjustment for overpayment of aid requires discontinuance for one month for an otherwise eligible recipient. (See Sec. B-648, Discontinuance of Aid.)

If request for restoration has been made, the eligibility of the former recipient shall be determined before aid is restored. The circumstances in each case will determine which eligibility factors will be redetermined but special attention shall be given to the factor which resulted in the previous discontinuance. (See Sec. B-624, Beginning Date of Aid-Restoration.)

Whenever aid is discontinued due to the confinement of the recipient in any public institution, the board of supervisors in its order discontinuing aid may provide that aid be restored without further order on its part when the person ceases to be an inmate of the institution.

To effect this automatic restoration if aid is discontinued because of confinement in a public institution, two Notices of Change, Form Bl 232, shall be approved on the case. One form orders discontinuance effective as of the last day of the month in which the recipient is admitted to the institution, or in the case of temporary medical or surgical care, as of the end of the month in which the eligibility period is completed. The second form orders restoration with no date specified. Upon release of the recipient from the institution, the second Form Bl 232 is completed showing the date of release, and immediately submitted to the SDSW. A warrant is then issued for the balance of the month during which the recipient was not an inmate, and claim made on the current monthly payroll.

Restitution for aid to which a recipient was not entitled or the execution of an agreement to repay the county for such aid shall not be a condition for restoration or continuance of aid to which the recipient is currently (See Sec. B-115, Application Process-Definitions; B-140, When Application is to be Taken.) (W&IC 3044, 3075, 3444, 3460)

B-657 (Continued)

B-657

If the recipient or the payee is handicapped to the extent that he is unable to sign his name or to make his mark, it is acceptable for a witness to touch the pen to the body of the recipient prior to making the mark for him. Thus, by making the ritual a physical act rather than actually having the recipient himself make the mark, the objective of maintaining the comfort and the dignity of the individual can be approached. In this instance, the mark itself is made by one of the two witnesses.

Example of a form which may be used on the reverse side of the warrant to obtain proper endorsement:

Endorsement hereon acknowledges payment for month specified

This warrant must be endorsed on the line below by the person in whose favor it is drawn, and the name must be spelled exactly the same as it is on the face of this warrant. (Note: If endorsement is made by mark (X) see instructions below.)

(Sign on this line)

FORM FOR ENDORSEMENT BY MARK (X)

If endorsement is made by mark (X) it must be witnessed by one person who can write. Use form below:

(HIS) OR (HER)

(Payee's name must be written on this line exactly as it appears on face of warrant.)
Witness to mark:

Name _

Address____

Name

Address_

(W&IC 3075, 3460)

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Effective June 1, 1951

B-654 (Continued)

B-654

name of the payee, and all material facts relative to its loss or destruction. Upon the filing of the affidavit the auditor shall issue and deliver to the payee a duplicate warrant bearing the same date as the original warrant for the full amount of the original warrant and the treasurer shall pay the duplicate in lieu of the original warrant. The reissued warrant must be presented for payment within the same time limit set forth for the original warrant.

If ownership of the warrant had passed from the original payee to another person (bank, store, etc.) by endorsement prior to the time it was lost or destroyed, the amount due may be recovered by the legal owner of the warrant in the manner set forth above. In this event the county auditor shall issue and deliver the duplicate warrant to the legal owner instead of the original payee.

A warrant shall be considered lost if it has been mailed and has not been received by the addressee within twenty days after the date of mailing.

A warrant shall be considered to have been destroyed if it has been canceled in error by the county auditor. (W&IC 3075, 3460; Gov. Code 29850, 29851, 29852, 29853)

B-657 ENDORSEMENT OF WARRANTS

B-657

Warrants issued in payment of aid shall be endorsed by the authorized payee in order to signify receipt of payment, except in the case of a deceased grantee or payee as provided in Sec. B-660, Payment When Grantee Dies. Warrants issued in favor of the legally appointed guardian of a recipient shall be endorsed by the guardian.

A payee may endorse a warrant in a foreign language which differs in appearance from his name as it appears on the face of the warrant, e.g., in Chinese characters. Such endorsement is acceptable unless there is a reason to doubt its authenticity.

If a payee is unable to write his name, he may endorse his warrant by means of a mark, e.g., an X or a thumb print. Such mark endorsement shall be accompanied by the name of the grantee and the signature and address of at least one witness in attendance at the time the mark endorsement is made.

(Section Continued on Next Page)

611-30

B-660 (Continued)

B-660

b. Endorsements on warrants made under Summary Probate Proceedings should refer to the supporting affidavit required of persons claiming estates under Sec. 630 of the Probate Code.

If the payee (guardian) is other than the recipient of aid, the warrant shall not become part of the payee's estate in case of his death. The original warrant, issued to the deceased payee, shall be canceled and a duplicate warrant shall be issued to the new payee or guardian.

B-663 NOTICE OF CHANGE - GENERAL INSTRUCTIONS

B-663

A. Use of Section I

The Notice of Change, Form Bl 232, except as it provides for identifying information, is divided into sections, which are designated as Sections I, II, III, IV, and V.

One Form Bl 232 may be used to report two actions of the board of supervisors on the same case provided both actions occur on the same day.

Example: In ANB aid is increased on October 15, effective November 1, due to verified need in excess of \$85. On the same date, the board of supervisors decreased aid effective December 1, as the special need exists for only one month.

If one Form Bl 232 is used to report two actions, the information reported in Columns 5 and 7 should refer to the first action. Report the necessary information to explain the second action under "Reason for Change."

If aid is restored following release from the county hospital or infirmary, restoration action of the board of supervisors is reported opposite "Restoration."

Section I is used to report information regarding:

- 1. Type of change affecting the recipient. This includes decrease, increase, restoration or discontinuance of the recipient's grant or transfer from ANB to APSB or vice versa.
- 2. Reason for change. The reason for discontinuance of aid to the individual is not recorded here but shall be shown in Section II.

(Section Continued on Next Page)

362-00 Restated

B-660 PAYMENT WHEN GRANTEE OR PAYEE DIES

B-660

If an eligible grantee dies on or after the first day of the month, aid shall be paid for the full month even though the warrant had not been delivered before death occurred.

In the event that a county has knowledge of the recipient's death prior to the preparation of the warrant, the warrant shall be made payable to one of the following:

- 1. The grantee.
- 2. The duly appointed and qualified executor or administrator of the recipient's estate.
- 3. Whomever the California Probate Code designates as the proper party to receive monies belonging to the decedent's estate.

If the decedent's estate falls within the categories outlined in Sec. 630 of the Probate Code, Summary Probate Proceedings, the warrant may be made payable to such successor when he furnishes the county auditor with an affidavit showing his right under that section to receive the money.

If the recipient dies before he has been paid any retroactive aid for which he was found eligible, and which was authorized, such aid shall be made payable as outlined above. (SSWB vs County of L. A., etc; S. F. 17111, Supreme Court, 10/16/45)

A warrant made payable to the grantee but not endorsed by him may be endorsed only by one of the following:

- 1. The duly appointed and qualified executor or administrator of the recipient's estate.
- 2. Whomever the California Probate Code designates as the proper party to receive monies belonging to the decedent's estate.
 - a. If the decedent's estate falls within the categories outlined in Sec. 630 of the Probate Code, the warrant may be endorsed by such successor when he furnishes the county treasurer with an affidavit showing his right under that section to receive the money.

B-663 (Continued)

B-663

- 362-05 Restated
- Column 5. Enter sources from which income other than the grant is received and amount received from each. The total of amounts of income from individual sources, as shown in Column 5, should agree with the figure entered in Column 4.
- Column 6. (ANB only) No entry is made unless the total need exceeds \$85, in which case the total need per month is reported here.
- Column 7. (ANB only) Report the nature and total cost of each item which causes the total need to exceed the basic grant, and the method of verification, e.g., new roof \$80; payments \$8 a month. Verified by contractor.

Transfer from ANB to APSB or Vice Versa:

- When reporting a change from ANB to APSB or vice versa, detailed information regarding the change in type of aid shall be given under "Reason for Change." In APSB, this shall include information regarding plan for achieving self-support.
 - Column 1. Indicate by check whether recipient is being transferred from ANB to APSB or vice versa.
- Column 2. Enter the beginning date of aid under the program to which the recipient is being transferred.
 - Columns 3, 4, 5, 6, and 7. See above.
- Discontinuance of aid under the program from which the recipient is being transferred should be reported in Section II, Item C-17. (See Sec. B-220, Change of One Form of Aid to Another.)

Discontinuance:

362-05 Restated

-05

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- Enter in Column 2 the effective date of the discontinuance. Other columns in Section I are left blank. Section II shall be completed for each discontinuance of aid to the individual.
- In ANB, discontinuance of payment to the county for hospital or infirmary care and restoration of aid may be reported on the same Form Bl 232 unless there is a delay in the restoration of aid to the former recipient, in which case separate forms are necessary.

B-663

B-663 (Continued)

If the reason for change (except discontinuance of aid to the individual) is clearly indicated by the entries in the vertical columns opposite the particular type of change which is effective, it need not be repeated under this heading. Report any additional information in this space.

Change of recipient's name, due to marriage, court order, or for other reasons; certain changes in guardianship status in accordance with Sec. B-155, Guardianship; the month or months for which suspended payment was canceled as provided in Sec. B-636, shall be reported under "Reason for Change."

In a restoration following release from a public institution, the exact date of release shall be reported here. In reporting restorations for other reasons, information shall be entered here as to the exact date and the reason the recipient became eligible subsequent to discontinuance of aid, and the date the recipient's request for restoration was made.

Decrease, Increase, or Restoration:

- Column 1. The type of action is indicated by completing the information called for in the vertical columnar headings (2, 3, 4, etc.) in the space provided opposite "Decrease", "Increase", "Restoration", etc.
- Column 2. Enter the date from which the change is effective. If retroactive aid is paid as provided in Sec. B-630, Retroactive Aid Payments, the month for which the retroactive payment was made should be entered in this column.
- Column 3. Enter the monthly rate of aid granted from the effective date shown in Column 2. (If aid is restored effective from a day subsequent to the first day of the month, the monthly rate rather than the prorated amount shall be entered.)

If retroactive aid is paid as provided in Sec. B-630, enter the monthly rate of aid granted from the effective date shown in Column 2.

Column 4. Enter the total of all income received other than the grant.

(If need in excess of \$85 in ANB has not been established, the sum of Column 3 and the non-exempt income in Column 4 shall total \$85. The total may not exceed or be less than these amounts.)

B-663 (Continued)

B-663

under Item C2 if the recipient is responsible for management of the household, or under Item C3 if the spouse is responsible for management of the household.

- Item C7. Income from property--Check if aid was discontinued because of receipt of income from real or personal property. Write a brief description of the nature of this income; e.g., rent from dwelling, interest on loan, etc. If necessary, additional space may be used under "Remarks."
- Item C8. Income from other sources—Check if aid was discontinued because of the receipt of income from some source other than those listed under Items C2-C7. Write a brief description of such income; e.g., unemployment insurance, old age and survivors' insurance. If necessary, additional space may be used under "Remarks."
- Item C9. Subsequent information disproves eligibility originally established—Check if aid was discontinued because subsequent information indicated that the recipient was not eligible for the original grant. Indicate under "Remarks" the specific grounds for ineligibility; e.g., age, property, residence, etc. Explain briefly how and when ineligibility was discovered.
- Item ClO. Change in law or policy—Check if a change in legal or administrative policy automatically makes the case ineligible at the time of change although previously it was eligible. Specify briefly the nature of the change.
- Item Cll. Present vision exceeds standard for blindness—Check if aid was discontinued because recipient is not blind within the prescribed degree. When conclusive evidence establishes that recipient was not originally eligible as to degree of blindness, check Item C9.
- Item Cl2. Refusal after acceptance to comply with established regulations—Check if aid was discontinued because the recipient refused to comply with established regulation; i.e., refusal to supply information, soliciting alms.
- Item Cl3. Excess property—Check if aid was discontinued because the value of the recipient's real or personal property, or both, exceeds that permitted under the ANB law but the need for assistance is not materially reduced by the income, if any. If the income meets the recipient's needs, check Item C7.
- Item Cl4. In county hospital (medical care) more than two months—Check if aid was discontinued because the recipient received aid for two calendar months after admission to a county hospital for medical care, and enter the date of admission.

B. Discontinuance of Aid to the Individual Recipient - Section II

Item A. Date ineligibility discovered -- Enter the date on which the facts causing discontinuance of aid to the recipient came to the attention of the county.

Item B. Date of last previous county investigation—Enter the date on which the county investigation preceding the one resulting in discontinuance of aid to the recipient was completed.

Item C. Reason for discontinuance of aid to recipient—Check all applicable reasons for discontinuance which appear on the list. For example, if earnings of spouse (Item C3) and contributions from parents or adult children (Item C5) result in the discontinuance of a case, check both Item C3 and Item C5.

Item Cl. <u>Death</u>—Check if aid was discontinued because of the death of the recipient, and enter date of death. If death occurred in county hospital or other public institution, enter the date of admission under Item Cl4, Cl5, or Cl6, whichever is applicable.

Item C2. Earnings of recipient—Check if aid was discontinued because of earnings of the recipient (including earnings from self-employment).

Item C3. Earnings of spouse--Check if aid was discontinued because of the receipt of support from earnings (including earnings from self-employment) of recipient's husband or wife, whether or not the earnings were considered community property.

Item C4. Other resources of spouse--Check if aid was discontinued because of support from separate income of the spouse; i.e., rental of spouse's separate property, or separate income from any source other than earnings of the spouse.

Item C5. Contributions from parents or adult children—Check if aid was discontinued because of the receipt of support from parents or adult children.

Item C6. Contributions from others--Check if aid was discontinued because of contributions from persons other than the spouse, parents or adult children.

Do <u>not</u> check Item C6 if the income was derived from roomers and/or boarders in the household; discontinuance under these conditions should be entered

B-663 (Continued)

B-663

The changes in economic circumstances reported in Section III may or may not be the cause of the discontinuance reported in Section II. For example, a recipient's grant might be discontinued because increased earnings have made him ineligible. In this case Item C2 would be checked in Section II, and Item 1 would be checked in Section III. On the other hand, if a recipient became ineligible because of a son's contributions and simultaneously had an increase in earnings not sufficient in itself to make him ineligible, Item C5 would be checked in Section II, and Item 1 would be checked in Section III since it appears first in the list.

Unless some preceding item is applicable, cases in which need for assistance has been decreased by the receipt of old age and survivors' insurance, workmen's compensation, and unemployment compensation should be reported in Item 4 or Item 5 of this section.

Item 1. Employment or increased earnings of recipient—Check this item for cases in which the recipient's need has decreased because of his employment or an increase in his earnings (including earnings from self-employment). The increase in earnings may be the result of higher wages or fuller employment.

Item 2. Employment or increased earnings of other person in home—Check this item for cases in which recipient's need has decreased because of the employment or increased earnings of any other person in the home (including earnings from self-employment). The increase may be the result of higher wages or fuller employment.

If an increased contribution is made to the recipient by a person in the home without new employment or increased earnings or increase in other resources, the case should be reported in Item 6.

Item 3. Allowance, pension, or other payment connected with military service, received by person (including the recipient himself) in home—Check this item for cases in which the recipient's need for assistance has decreased through the receipt, by any person in the home, of an allowance, pension, or other payment connected with military service, which is given on the basis of service or disability. Include here allowances, death gratuities, military insurance, and disability benefits, not only to persons in the armed forces and their dependents, but also to civilian employees and their dependents, as provided for in veterans' legislation; pensions to widows and orphans of veterans of World War I; and payments under the Servicemen's Readjustment Act of 1944 (commonly known as the GI Bill).

B-663 (Continued)

B-663

Item C15. Admitted to county infirmary (custodial care) -- Check if aid was discontinued because recipient entered a county infirmary for custodial care; i.e., shelter and maintenance only, and enter the date of admission.

Item Cló. Admitted to other public institution—Check if aid was discontinued because the recipient entered a public institution other than a county hospital or county infirmary. Enter the date of admission and the name of the institution.

Item Cl7. Accepted for APSB, ANB or OAS--Check the name of the program under which aid is to be granted from date of change.

Item Cl8. Loss of state residence--Check if aid was discontinued because the recipient has moved out of the state and has established residence elsewhere.

Item Cl9. Transferred to-----County-Check if aid was discontinued because the recipient has moved to another county and the second county has become responsible for the payment of aid. Insert name of second county.

Item C20. Other reason—Check if aid was discontinued for some reason other than those listed under Items Cl through Cl9. Describe the reasons or circumstances for this discontinuance under "Remarks." Check this item if recipient was admitted to a private institution (an institution which does not derive support from public funds) only if the recipient would have continued eligibility for aid had he not entered the institution.

In ANB, if federal participation is not available in payments made to the recipient after admission to the public medical institution, state under "Remarks" the specific months for which federal participation is not available and give the reason.

DB 443

C. <u>Material Changes in Economic Circumstances of Discontinued Cases</u> (Exclude Death) Section III

Section III is to be completed for all discontinued cases except those discontinued because of death. If two or more items in Section III apply in a given case, check the item appearing first on the list. If there has been no material change in the recipient's economic circumstances, check Item 7, "No known material change in economic circumstances."

362-46

This section is designed to provide information on the number of cases in which there was an increase in the income of the individual that would wholly or partly offset the effect of discontinuing assistance.

362-50 Restated B-663 (Continued)

B-663

D. Payment to County for Institutional Care - Section IV ANB Only

Section IV is used to request payment to the county for hospital or infirmary care rendered to former recipients, and to request that such payment to the county be discontinued.

Under "Type of Care" check the type of institution in which the care is rendered, i.e., county hospital (medical or surgical care) or county infirmary if shelter and maintenance (custodial care) is the only care given.

Under "Begin Payment" report the date from which payment to the county for hospital or infirmary care is requested, and show the amount of the grant to the recipient for the month in which admitted to the institution.

Use the space under "Discontinue Payment" to report discontinuance of payment to the county for hospital or infirmary care. Opposite "Effective Date" enter the date of the last day for which the subvention is requested. Check the reason for discontinuance, i.e., discharge from the hospital or infirmary, or death, and enter the date such event occurred.

If the county giving care is not the county of the former recipient's residence, this fact shall be noted by showing in the space for name of county at top of form the name of the county actually claiming subvention followed by the parenthetical statement ("resident of ______County"). It shall be the responsibility of the county claiming subvention to determine from the first county the amount of the grant at the time of entering the institution. (See Sec. B-518, Institutional Subvention for Hospital or Infirmary Care.)

E. Approval by the Board of Supervisors - Section V

Section V is used to report action of the board of supervisors. Action of the board of supervisors is required upon all Notices of Change except those which report change of name of recipient and changes in guardianship status.

Enter name of county and date of approval by the board of supervisors. The Notice of Change shall bear either the original or facsimile signature of the county clerk or deputy. (Walc 3044.1, 3075, 3078.3, 3089, 3460)

B-666 NOTIFICATION TO SDSW OF CHANGE IN AMOUNT OF AID

B-666

The Notice of Change, Form Bl 232, shall be forwarded to the SDSW as soon as possible but not later than 15 days after board of supervisors' action.

B-663 (Continued)

B-663

Item 4. Increased support from person outside home—Check this item for cases in which the recipient's need for assistance has decreased because of increased support from a person outside the home. This item includes support from relatives who have not previously contributed, and not only support from relatives whose ability to contribute has increased, but also those who without any change in circumstances have assumed more responsibility for support.

Item 5. Increase in other resources of person (including the recipient himself) in home—Check this item for cases in which the recipient's need for assistance has decreased by reason of resources other than those specified in items above. Life insurance benefits (other than military insurance), the inheritance of income—producing property or money, the receipt of old age and survivors' insurance, and increased income from investments of real or personal property, are examples of resources to be included here.

Do <u>not</u> include resources if the resources were available when the payment was approved, and the payment would not have been made had the resources been known to exist; such cases should be reported in Item 7, "No Known Material Change in Economic Circumstances."

Do <u>not</u> include real or personal property, the value of which has increased beyond the legal maximum, but need is not materially reduced by the income; such cases should be reported in Item 7, "No known material change in economic circumstances."

If an increased contribution is made to the recipient by a person in the home without new employment or increased earnings or increase in other resources, the case should be reported in Item 6.

Item 6. Other material change in economic circumstances—Check this item for cases in which the recipient's need for assistance has decreased for reasons other than those specified in items above; i.e., cases in which need has decreased with no increase in resources, and cases in which need has been decreased because of marriage of the recipient.

If an increased contribution is made to the recipient by a person in the home without new employment or increased earnings or increase in other resources, the case should be reported under this item.

Item 7. No known material change in economic circumstances—Check this item for cases in which there is no known change in economic circumstances of cases discontinued; i.e., any non-income reason.

B-672

- 1. The unadjusted balance of the overpayment, if partial adjustment has been made in the current adjustment period, or
- 2. The total amount of the overpayment, if no adjustment within the current adjustment period is possible.

In the absence of fraudulent intent there is no right to request repayment except to the extent that overpayment can be adjusted within the current adjustment period. (WAIC 3006, 3075, 3405, 3450; AGO 47/307)

B-674 INVESTIGATION OF OVERPAYMENTS

B-674

Whenever it appears that an overpayment of aid has been made, i.e., aid has been paid during a period for which there was not eligibility or a greater amount of aid has been paid than for which there was eligibility, the county shall determine:

- 1. Whether overpayment of aid has been made
- 2. The period of overpayment
- 3. The reason for overpayment
- 4. The amount of overpayment
- 5. Whether or not overpayment was the result of fraudulent intent
- 6. Whether the right to request repayment exists.

These determinations and the bases for the determinations shall be recorded in the case record. (See Sec. B=688 regarding erroneous payments made for which there is no valid authorization.) (W&IC 3006, 3075, 3405, 3405, 360 47/307)

B-676 SOURCE OF REPAYMENT

B-676

If the right to request repayment exists, repayment shall be demanded within the limits of the California Civil Code and the Code of Civil Procedures from any and all resources (real and personal property) of the debtor, except that repayment shall not be demanded from:

(Section Continued on Next Page)

1-20

B-666 (Continued)

B-666

The following chart shows the number of copies to be submitted to SDSW for the indicated actions:

Restated

	NUMBER OF COPIES
	2
	2
	1
N.	1
	2
	2
	1

(W&IC 3075, 3085, 3460)

B-669 NOTIFICATION TO COUNTY AUDITOR OF CHANGE

B-669

A copy of the Notice of Change, Form Bl 232, should be sent to the county auditor. There should be complete coordination between the county welfare department and the county auditor so that payrolls each month correctly reflect the current status of all cases for which claim is made. (W&IC 3075, 3460)

B-672 RIGHT TO REQUEST REPAYMENT OF AID

B-672

If an overpayment occurs and it is not possible to effect a complete adjustment within the current adjustment period either by decrease or discontinuance of aid, the right to request repayment of aid exists only in those cases in which the aid was received as the result of false statement, misrepresentation, or other fraudulent device, and only to the extent of:

(Section Continued on Next Page)

1

B-680 DETERMINATION OF DEBTOR'S ABILITY TO REPAY

B-680

If the debtor does not reply to the demand for repayment within a reasonable time, a determination shall be made as to the debtor's ability to repay that portion of the debt which has not been adjusted within the current adjustment period. If the unadjusted amount is \$50 or more, an investigation shall be made and the following shall be recorded centrally or in the case record:

- 1. A statement of the sources and amounts of income.
- 2. A listing of real and personal property.
- 3. If the debtor is currently a recipient of aid, the real and personal property required to meet certain of his continuing needs as defined in Sec. B-676, Source of Repayment.
- 4. A statement from the debtor as to his intent and pecuniary ability to repay.

Form A, Statement of Debtor's Resources, is suggested for the recording of the investigation.

If the unadjusted amount is less than \$50, the investigation and recording are optional. (Walc 3006, 3008, 3075, 3407, 3460)

B-682 PLAN FOR COLLECTION OF OVERPAYMENTS OF AID

B-682

The following shall form part of a plan for collection effort in all counties, unless a different plan, designed to accomplish the same objectives, is submitted to the SDSW.

Such counties shall file their plan with the SDSW by March 1, 1951, and may operate under its provisions until notified of the rejection of the plan by the SDSW.

1. If, within a reasonable time from service of a Demand for Repayment (see Sec. B-678), the repayment has not been made or a satisfactory plan for repayment submitted, the debtor shall be requested to complete and sign a non-interest bearing Agreement to Reimburse Note (see suggested Forms B and C). This Note may be payable in specific amounts on specific dates or it may be made payable "on demand." In

B-676 (Continued)

L. The current grant or income required to meet the current need of the recipient unless the overpayment can be adjusted within the current adjustment period.

- 2. Real and personal property required to meet certain of the recipient's continuing needs. These are:
 - a. Real property: the home in which he lives;
 - b. Personal property: household furniture, equipment and furnishings, personal effects, clothing, and an automobile if such automobile has been determined to be necessary to his particular need.

Repayment may be demanded, within the limits of the Probate Code, from any and all real and personal property of the estate of a former recipient, except that the rights of the county shall be subordinated to the rights of a surviving spouse who is a recipient of aid, if the surviving spouse executes an agreement not to transfer or encumber such property without the consent of the county. (W&IC 3008, 3075, 3407, 3460)

B-678 DEMAND FOR REPAYMENT

B-678

B-676

If the right to request repayment exists, a formal written demand shall be promptly served upon the debtor. This demand may be mailed to the debtor at his address of record or may be delivered in person. It shall include the following:

- 1. The reason for, and the amount of, the repayment due.
- 2. A statement that the right to request repayment exists.
- 3. A statement that the repayment is due and payable immediately and that repayment or a satisfactory plan for repayment is required within 30 days. If the debtor is a recipient without resources other than the grant and the income to which he is currently entitled, a statement shall be made that he is not obligated to make repayment from such funds.
- 4. A statement that, upon request, a county representative will be available to advise him as to his rights and responsibilities with respect to the amount due. (W&IC 3006, 3075, 3405, 3460)

B-682 (Continued)

B-682

- 8. Unless rendered inoperative by an action of the debtor, the Statutes of Limitations in California on repayment of aid are generally as follows:
 - a. For unsecured debts not arising from fraudulent action on the part of the debtor nor evidenced by a promissory note or a contract in writing, the statute runs two years from the date of the overpayment.
 - b. Where the liability is created by statute, the Statute of Limitations runs three years from the date of the overpayment of aid to the recipient.
 - c. Where fraud is established on the part of the debtor, the statute runs three years from the date of the discovery of the fraud.
 - d. For debts evidenced by a promissory note or a contract in writing, the statute runs four years from due date of such written instrument.
 - e. On judgment liens the statute runs five years from the date of entry of judgment or of renewal thereof.

A debt in groups a, b, or c can be extended four years by securing an Agreement to Reimburse Note (see d). Such debt can be further extended five years by securing a Confession of Judgment or judgment as a result of collection suit (see e). All debts (excepting probate actions) can generally be renewed repeatedly by appropriate legal means if action is taken prior to the running of the statute. (Reference Code of Civil Procedures Sections 336 to 345, inclusive.)

If any debt appears to be in jeopardy because of the operation of a Statute of Limitations, action shall be taken to prevent a lapse of the county's rights.

- 9. The following procedures shall be established to safeguard the monies due the County, State, and Federal Governments:
 - a. Establishment of adequate internal controls to prevent overpayments of aid.
 - b. Immediate investigation of apparent overpayments to determine if the right to request repayment exists.
 - c. Execution of a plan for collection prescribed by this section whenever the right to request repayment exists.
 - d. Periodic follow-up of all unpaid debts with a planned series of collection letters or personal visits or both and reinvestigation of the debtor's financial status not less frequently than semi-annually. If circumstances justify, follow-up may well be made monthly. (Walc 3006, 3075, 3405, 3460)

B-682 (Continued)

B-682

the latter case and provided the amount due is \$50 or more, the debtor shall also be requested to execute a Confession of Judgment (see suggested Form D) with the understanding the Judgment will not be executed until after death of the recipient or his spouse (see Sec. B-676) or until additional property is available.

If a debtor has a policy of life insurance and the amount due is \$50 or more, he shall be requested to assign the insurance policy to the county with the understanding that the proceeds of the policy will be applied toward liquidation of the debt and the remainder, if any, to be turned over to the beneficiary.

- 2. If the debtor is unwilling to execute a Confession of Judgment, the county shall file a suit unless the investigation prescribed in Sec. B-678 has determined that the debtor does not own property from which repayment can be made either presently or in the future. Suits for amounts from \$50 to and including \$100 shall be filed in the small claims court. If the amount due is less than \$50, the filing of a suit in small claims court is recommended but not mandatory.
- 3. A Confession of Judgment given by the debtor or a judgment rendered as a result of suit shall be immediately recorded as a lien against specific items of real property of the debtor with an omnibus clause to include such additional property as the debtor may thereafter acquire.
- 4. Judgments and all liens applying thereto shall be renewed at necessary intervals to insure that they will not lapse because of the running of a Statute of Limitations. (See Item 8, of this section.)
- 5. If the debtor has no resources available to satisfy the debt, and a lien has been recorded against his property, foreclosure shall be deferred until after death (See Sec. B-676), at which time claim shall be filed in probate proceedings.
- 6. A periodic check of probate records shall be made. It is recommended that this check be made monthly, but in no event shall it be made less frequently than quarterly. Any probate involving the estate of a deceased recipient shall be checked in order to determine if the decedent was a debtor against whose estate a claim for repayments due can be filed.
- 7. Other remedies contained in the California Code of Civil Procedures, except as prohibited by W&IC 3008 and 3407, may be utilized by the county to enforce collection of amounts due from recipients or former recipients of aid. These remedies include garnishment, attachment, restraining orders, and proceedings supplemental to execution.

	AID PAYMENTS	Aid to the Blind
B-682 (Continued)		B - 682
Suggested Form C		
	AGREEMENT TO REIMBURSE NOTE (Demand Note)	
	State No	
	County No	
	Name —	
		, California
of	d I promise to pay to the order of the C	e in Dollars
part thereof,	suit is instituted to collect this note, I promise to pay such additional sums judge reasonable as attorney's fees in s	as the

(Section Continued on Next Page)

Signature____

Address____

Witness:

Address:

B-682 (Continued)

B-682

Suggested Form B AGREEMENT TO REIMBURSE NOTE (Installments)
State No
County No
Name
, Californ
In installments and at the times hereinafter stated, I promise to pay to the order of the County of
(Section Continued on Next P

B-684 CLOSING OF REPAYMENTS RECEIVABLE

B-684

Repayments Receivable shall be held open and appropriately followed up and may be dropped from active status only under the following conditions:

- 1. Repayment is fully made.
- 2. Debt is less than \$50 and collection cannot be affected through small claims court or without resort to measures, the cost of which would equal or exceed the amount of the debt.
- 3. Debt is discharged in bankruptcy proceedings.
- 4. Debt is voided by operation of the Statute of Limitations.
- 5. Debtor is deceased and probate action closed.

Records of closed repayments receivable shall be filed centrally, separate from those in active status. (WaIC 3075, 3460)

B-686 ALLOCATION OF REPAYMENTS TO PERIODS

B-686

If a person making a voluntary repayment of aid legally granted, specifies the period to which he wishes the repayment allocated, it shall be so allocated. In the absence of such specification, the amount of such collection shall be allocated to the entire period during which aid was received and shall be considered a repayment, partial or total, of the entire amount of aid granted.

Collections resulting from claims against estates and actions against responsible relatives are allocated to the period during which the amount for which action is taken was paid. The amount collected may represent either total or partial repayment for such period.

Adjustments shall be allocated to the period during which the basis for the adjustment accrued. (W&IC 3007, 3075, 3088, 3406, 3460, 3474)

B-688 ERRONEOUS PAYMENTS

B-688

An erroneous payment is a payment or a series of payments made for a period for which there was not a valid authorization by a county board of

(Section Continued on Next Page)

62-0

A A A	4 -	41	Blind
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AID PAYMENTS

B-682 (Continued)	B-682				
Suggested Form D					
IN THE (enter name an	d jurisdiction of court)				
COUNTY OF)					
Plaintiff)	NO.				
vs.	CONFESSION OF JUDGMENT (CCP 1132-1135)				
Defendant)					
I,, being duly	sworn, declare and depose as follows:				
I hereby confess judgment in favor of the county of, the plaintiff above named, for the sum of \$ (enter the specified sum for which entry of judgment is authorized), and authorize the entry of judgment therefor against me.					
This Confession of Judgment is for a debt justly due from me to the said County of, and arises upon the following facts; to wit,					
(enter here the facts out of which the debt arose, i.e., the cause of the overpayment and the reason the right to request repayment exists; e.g., the receipt of Aid to Needy Blind from August 1, 1950, through December 31, 1950, while I was ineligible because of the possession of personal property in excess of \$1,200.00, which property I had not declared to the county.)					
	(Signature of defendant)				
Subscribed and sworn to before me					
thisday of, 195					
(Signature, Title, and seal of person authorized to administer oath)					
IT IS ORDERED, ADJUDGED, AND DECREED do have and recover of and from the said together with the sum of					
Da	ted				
	(Signature of Clerk of Court)				

B-690 (Continued)

B-690

A voluntary repayment of aid, made upon the initiative of the payer without request or suggestion on the part of the county, constitutes a gift, and shall not be deemed to have been erroneous. (AGO NS 1459)

If the county wishes to have the SDSW make an independent finding in addition to the county's finding, request for such a finding shall be made in writing to the SDSW at Sacrament, the request shall be accompanied by a statement showing the claimant's contention, the amounts and periods involved, and the basis upon which the repayment was collected by the county.

In cases where the county or the SDSW certifies that an erroneous repayment was made, the federal, state and county shares of the erroneous repayment shall be returned.

Recipients of aid whose claim for the return of an erroneous repayment of aid has been rejected by the board of supervisors shall be informed of their right to appeal to the SSWB. (Waic 3075, 3460)

B-692 FINANCIAL RECORDS MAINTAINED BY COUNTY

B-692

A. On All Recipients

An individual account should be kept in the county for each recipient of aid. Such a record should include the name of the grantee and/or payee, the state case number, the amount of the grant, the effective date of the grant, all changes in the rates of aid, the effective dates of such changes, the dates of payment and warrant numbers. All payments should be posted to these accounts. Cancellations, collections, and other adjustments should be recorded.

These records should be filed in numerical sequence by state number. The issuance of warrants and payroll listings should follow the same order to facilitate posting.

B. On Collectible Overpayments

In addition to the recording of data on overpayments of aid in the case record as provided in Sec. B-674, there shall be maintained in each county a central record of Repayments Receivable, i.e., the amount of the repayment due. If the right to request repayment exists, a Repayment Receivable Record, Form ABC 831, shall be initiated. An equivalent record may be used

(Section Continued on Next Page)

612-0

B-688 (Continued)

B-688

supervisors, or for which there was a valid authorization for a lesser amount than the amount paid. Such payments may be adjusted without board of supervisor's action, within the current adjustment period. The right to request repayment exists for the unadjusted amount with the limitation that repayment may be required only from resources of the recipient other than the current grant or income required to meet the current need.

Erroneous payments, when discovered shall, if they have been claimed to the state as public assistance payments, be credited on a current claim. Amounts received in repayment from the recipient are credits to county funds. (W&IC 3007, 3082, 3406, 3471)

B-690 RETURN OF ERRONEOUS REPAYMENTS

B-690

An erroneous repayment of aid is one which has been collected upon the assumption that aid was extended to which the recipient was not in fact or by law 'entitled, and where it is later found that the recipient was in fact or by law entitled to the aid which he received. (AGO NS 5736)

An individual who believes that he has repaid aid in error may request the return of such erroneous repayment. This request may be made at any time but shall be made in writing. The written request constitutes a claim for the return of the money erroneously repaid; the claimant need not file his request with the county auditor or county clerk since Political Code Sec. 4075 is deemed to have no bearing on claims of this nature. Assistance shall be given by the county welfare department to individuals who wish to file a request for the return of erroneous repayments of aid. (AGO NS 5736)

Claims for the return of erroneous repayments shall be approved by the board of supervisors if it is found that the repayment of aid was collected erroneously. In making findings with respect to erroneous repayments of aid, the county shall determine if, during the period to which the repayment was applicable, there existed other factors of complete or partial ineligibility in addition to the one on which the repayment of aid was predicated; if such facts are found to have existed, it may be found that no return, or a return in a smaller amount, is in order. (AGO NS 5736)

Notification shall be given to any recipient who made a repayment of aid which is determined to have been an erroneous repayment and he shall be advised of his right to seek reimbursement.

B-692 (Continued)

B-692

provided it is approved by the SDSW. These records shall be filed by aid program in state number order or alphabetically with cross index to state number and shall provide data as to:

- 1. The debtor's name and state number and whether currently in receipt of aid.
- 2. The amount of the repayment due less any adjustments made in the current adjustment period.
- 3. The period to which the overpayment applies.
- 4. The reason for the overpayment.
- 5. Whether the overpayment was the result of fraudulent intent on the part of the debtor.
- 6. Record of any change in the determinations included in Items 2 through 5.
- 7. Whether a Statement of Debtor's Resources, or equivalent, is on file.
- 8. A record of all repayments made as to dates and amounts.
- 9. Chronological record of all contacts made by letter or personal visit together with record of:
 - a. Whether Agreement to Reimburse Note or Confession of Judgment procured.
 - b. All legal actions taken, judgments procured, property liens taken, and resulting attachments.
 - c. In case of fraud, whether criminal action was taken and the outcome thereof.

(W&IC 3006, 3075, 3405, 3460)

home visit may be waived when there are not reasonably adequate public transportation facilities to the home. An interview shall be held elsewhere. The case record shall set forth the conditions which made a home visit impossible.

To insure the completion of the determination of eligibility prior to the effective date of the transfer, application should be taken by the second county well before the date aid is to be discontinued by the first county. If an application has not been taken by the second county within the one year period, it shall be taken immediately thereafter. For a regular recipient, aid shall be paid by the second county as of the first day of the month following the completion of one year of residence, unless the date of one year of residence starts on the first day of the month, in which event aid shall begin as of that date irrespective of the date of application or date of action by the board of supervisors. (See Sec. B-706 - Removal of Non-County Aid Recipients)

The presumption is that residence in the second county starts upon the date of removal from the first county. If, therefore, it appears that a lapse of time occurred between the date of removal from the first county and the establishment of residence in the second county, the second county shall obtain residence evidence which will either support or refute the presumption that the period of time for the acquisition of required residence started upon the date of removal from the first county. Form AB 216 (or AB 204, when used), shall contain an adequate explanation of any lapse between date of removal and date of establishing residence in the second county. In completing Section B of Form AB 215, the second county shall take into consideration the effect of the change in living conditions or other changes which might affect the amount of aid.

The second county shall complete Section B of Form AB 215, retain one copy, and return two copies to the first county together with Form AB 216 (or Form AB 204 when used), properly completed and attested, and such supplementary report as is necessary.

D. Submission of Documents

Upon receipt of Form AB 215 and Form AB 216 (Form AB 204 when payment of non-county aid is involved) the first county shall complete and sign Section C of Form AB 215. One copy shall be retained and one shall be sent to the second county.

The first county shall provide the second county with copies of:

- 1. Application, Form Bl 200.
- 2. Certificate of Verification of Eligibility, Form Bl 201.
- 3. Information concerning real and personal property holdings.

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B-703 TRANSFER OF AID PROCEDURES

B-703

For a regular recipient, county participation begins as of the first of the month following the completion of one year's residence in the second county, unless the date of completion falls on the first of the month, in which case participation begins as of that date. For regular recipients, county responsibility is not dependent upon whether blindness occurred while they were residents in or outside the State.

A. Inter-county Transfers

If the residence of a regular or a non-county recipient is established in another county in the state, inter-county transfer arrangements shall be initiated. There shall be no interruption or overlapping in receipt of aid occasioned by such change of residence.

The following procedure provides a method of notification between counties which will insure continued receipt of aid when residence has been changed from one county to another in this state. The counties involved hereinafter are designated as follows: first county—the county which is currently paying aid; second county—the county to which residence has been changed; third county—any subsequent county to which residence may be changed prior to completion of the required period of residence in the second county.

B. Action by First County

Notification of Transfer, Form AB 215, shall be prepared in quadruplicate by the first county, Section A being completed in full. One copy shall be retained and three copies shall be sent to the second county as soon as administratively possible after the first county learns of the recipient's removal to the second county. The first county shall supply the second county with any pertinent information other than that shown in Section A of Form AB 215 and request any specific information desired. In all transfer cases, the first county shall advise the second county of the recipient's residence status in the first county; i.e., regular recipient or non-county recipient. If non-county, the date residence was established in the first county shall be shown.

The first county shall send Notification to Recipient Who Changes County Residence, Form AB 217, to the recipient at the time Section A of Form AB 215 is completed. The notification informs the person of future county procedure and of his own responsibilities if delay or interruption of aid is to be avoided.

C. Action by Second County

Upon receipt of the Form AB 215, the second county shall make a home call to verify the presence of the recipient in the county, and to secure the completed Affidavit of County Residence, Form AB 216. (If non-county aid is to be granted by the second county Form AB 204, Applicant's Affidavit of Intent as to Residence, shall be secured in place of AB 216, to substantiate the date residence was established in the second county.) Exception: The requirement of a

B-703 (Continued)

H. Removal from Second County

- 1. After completion of new residence: If residence in another county is established subsequent to the date one year of residence in the second county was acquired, the second county shall be responsible for payment of aid until the end of the month following completion of one year's absence therefrom, except that when the change of residence took place on the first day of the month, responsibility of the second county ceases one year from that date.
- 2. Prior to completion of new residence: Should a regular recipient having residence in a second county establish residence in a third county before completing one year of residence in the second county, the second county has no responsibility for payment of aid. The first county continues to be responsible for the payment of aid on a participating basis until the end of the month following completion of a one-year period from the date residence in the second county was established, (unless the change of residence took place on the first day of the month). The first county shall notify the third county of the change in county residence and request the second county to forward to the third county such copies of documents as were furnished the second county by the first county at the time transfer arrangements were made with the second county. Transfer arrangements shall be entered into with the third county and wherever possible the third county shall grant aid on a non-county basis, effective the first of the month following completion of one year's residence outside the first county. (If non-county aid is to be granted by the third county, Form AB 204, shall be secured in place of AB 216, to substantiate date residence was established in the third county and the date residence was established outside the first county.)

If it is administratively impossible for the third county to secure an application and grant aid effective the first of the month following completion of one year's residence outside the first county, the first county shall continue aid and arrange with the third county a discontinuance date which will permit continuous payment of aid. In no event may the first county continue non-county aid beyond the first of the month following the date on which the recipient has acquired one year's residence in the third county. (Six months in case of a recipient who became blind while a California resident.)

B-703 (Continued)

- 4. Verification of the required state residence.
- 5. Letters of Guardianship or Summary of Letters of Guardianship, Form DPA 5.
- 6. Physician's Report of Eye Examination, Form Bl 227.
- 7. Notice of Findings and Action on Physician's Report of Eye Examination, Form Bl 263.
- 8. Current information concerning pecuniary ability of responsible relatives. (Form Bl 225, if used)

E. Notification to Recipient

In all transfer cases, Notification of Effective Date of Transfer, Form AB 218, shall be sent to the recipient. If a regular recipient is being transferred from the first county to the second county, the notification shall be sent not later than three months prior to the effective date of the transfer. In non-county aid transfer, the notification shall be sent immediately upon completion of the transfer arrangements.

F. Application, Etc., Obtained by Second County

The second county shall:

- 1. Secure a new Application (Form Bl 200) to be retained in the county file.
- 2. Complete the Certificate of Verification of Eligibility, Form Bl 201, in the same manner as for any new application and forward it to the SDSW.

G. Responsibility for Payment of Aid

If the responsibility for payment of aid is transferred from one county to another, the beginning date of aid in the second county may antedate the signing of the application in the second county. There shall be no interruption in aid because the application has not been signed prior to the date on which the second county is responsible for payment.

When a dispute arises between two counties regarding the beginning date of residence in a transfer case, the SDSW shall exercise full authority in weighing the evidence presented. See Sec. 382, Dispute on Responsibility for Payment of Aid.

(Section Continued on Next Page)

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122-55

B-703 (Continued)

B-703

Should payment of aid by the first county be discontinued inadvertently or without cause, the above rulings do not apply and the first county shall be responsible for restoration and for continued payment of aid in the same manner as though payment of aid had not been interrupted. (AGO NS3202)

(See Sec. B-367, "Reapplication by Former Recipient Who Retained State Residence" on recipients who return to county other than that of residence.)

(W&IC 3042, 3075, 3090, 3092, 3432, 3450, 3460, 3463)

B-706 REMOVAL OF NON-COUNTY AID RECIPIENTS

B-706

Recipients may move to another county with intent to reside while aid is being paid on a non-county basis by the first county. Should a recipient of non-county aid make such a change of residence, the following general policies shall govern the disposition of the case and reimbursement of aid: (See Sec. B-703, Transfer of Aid Procedures.)

A. Continuance of Aid

The counties involved shall agree upon a date of discontinuance by the first county and assumption of responsibility by the second county. If it is impossible for the second county to complete the determination of eligibility and grant aid by the date on which the recipient would have gained the required residence in the first county and participation would normally have begun in the first county, aid shall be continued by the first county on a non-county basis. Payment of non-county aid by the first county shall not continue later than the date upon which participation in payment of aid is in order in the second county.

If an application has not been taken by the second county prior to the date on which that county would be responsible for the payment of aid on a participating basis it shall be taken immediately thereafter and aid shall be paid by such county as of the first of the month following the completion of the required period of residence in that county.

B. Recipient's Return to First County

If a recipient of non-county aid establishes residence in a second county but reestablishes residence in the first county before the first county has discontinued aid, payment of aid on a non-county basis through the first county shall continue until such a time as the recipient has acquired the required residence in that county.

If a recipient of non-county aid establishes residence in a second county and aid has been discontinued by the first county for cause, and the recipient reestablishes residence in the first county prior to the granting of aid by the second county, the first county shall restore aid. Such aid will be paid on a non-county basis until such a time as the recipient has acquired the required residence in that county.

B-703 (Continued)

B-703

Example: A regular recipient in County A established residence in County B on April 5, 1949.

Transfer arrangements were initiated but the recipient removes to County C and established residence there on March 15, 1950. County A informs County C of the above facts. Since the date of removal to County C was immediately prior to the date on which County A's responsibility for payment on a participating basis would terminate, County A agrees to continue aid after April 1950 (on a non-county basis) until County C can secure an application and grant aid. Counties A and C agree on a date for discontinuance by County A and assumption of responsibility by County C which will result in continuous payment of aid. County C shall be responsible for the payment of aid as soon as administratively possible after April 1950 and not later than April 1, 1951, the first of the month following the completion of one year's residence in the third county. (October 1, 1950, in case of recipient who became blind while a resident of California.)

I. Return to First County

If a regular recipient moves to a county with intent to reside and then returns after an absence of less than one year to the first county with intent to remain, his residence in the first county is not deemed to have been interrupted. Aid shall be continued by the first county on a joint state and county basis, if eligibility continues. If aid has been discontinued because of established ineligibility during the period of absence from the first county, aid is paid on a non-county basis until the required period of county residence is again completed in the first county.

J. Discontinuance and Restoration During Transfer Period

If payment of aid by the first county (either on a participating or non-county basis) is discontinued for cause, subsequent to the recipient's removal to the second county, responsibility of the first county ceases. Should the former recipient request restoration of aid, a new application shall be taken by the second county. If eligibility is established but residence of one year in the second county has not been completed (six months in the case of a recipient who became blind while a resident of California), aid is payable on a non-county basis until the end of the month in which the required period of county residence is completed. If, however, residence in the second county was established on the first of the month, the second county participates in the payment of aid one year from such date (six months in the case of a recipient who became blind while a resident of California).

Example: A recipient who became blind while a state resident, moved from County A to County B with intent to reside on January 15, 1949. During March of 1949 he sold real property and on April 1, 1949, had cash in excess of the amount allowable. Aid accordingly was discontinued by County A effective March 31, 1949. During May of 1949 the recipient purchased other real property thus reducing his cash within the amount allowable. On June 10, 1949, he again requested aid. His application is taken by County B and non-county aid is granted by County B effective July 1, 1949. If the recipient continues to reside in County B, that county will participate in payment of aid on and after August 1, 1949. (Recipient became blind in state and county participates in payment of aid beginning the first of the month following completion of six month's residence in County B.)

B-706 (Continued)

B-706

C. Removal to a Third County

If a recipient of non-county aid moves from the second county to a third county before completing one year's residence in the second county and before the second county has granted aid, the first county shall continue payment of non-county aid until such a time as it is administratively possible for the third county to grant aid but not later than the first of the month following the date on which the recipient has acquired the required residence in the third county.

D. County Financial Participation

Non-county aid granted in the amount for which eligibility is established will be reimbursed in full by the state until the required period of residence has been completed in a single county (1 year for recipients who became blind while not California residents; 6 months for recipients, who became blind while California residents), which county then becomes responsible for payment on a participating basis.

For regular and non-county aid recipients, financial participation begins as of the first of the month following the completion of the required residence, unless the date of completion falls on the first of the month, in which case participation begins as of that date.

Example A: A non-county aid recipient residing in County A established residence in County B, on June 1, 1950. County A sent written notification of the residence change to County B and July 31, 1950, was agreed upon as the date aid was to be discontinued by County A. County B took an application on June 17, 1950, and proceeded with the required residence and need determination. In July the board of supervisors in County B granted aid effective August 1, 1950. County B is reimbursed on a non-county basis until May 31, 1951 (November 30, 1950, in case of a recipient who became blind while a California resident). If residence continues in County B, county financial participation will begin June 1, 1951 (December 1, 1950, for a recipient who became blind while a California resident).

Example B: A non-county aid recipient who would have completed the required residence in County A on July 6, 1950, established residence in County B on July 2, 1950. Responsibility rests with County B to accept an application and grant aid as soon as possible. If otherwise eligible, payment of aid must be continuous and County A and County B shall agree upon a date of discontinuance by County A. If the recipient remains a resident of County B and is otherwise eligible, aid must be discontinued by County A not later than July 31, 1951, (the first of the month following the completion of one year's residence in County B) (January 31, 1951 for a recipient who became blind while a California resident). Aid must be granted by County B not later than August 1, 1951. (February 1, 1951, for a recipient who became blind while a California resident.)

(W&IC 3040, 3041, 3042, 3075, 3090, 3431, 3432, 3460)

B-708 MEDICAL CARE FOR REGULAR RECIPIENT DURING TRANSFER PERIOD

B-708

The county to which a regular recipient has removed shall provide the necessary medical and/or hospital care if needed during the one year period of establishment of residence. The county may demand payment of the county granting the aid in an amount not exceeding the cost thereof. It shall be the duty of the county granting aid on a participating basis to pay such medical care and/or hospital charges. (Walc 3090, 3450)

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B-752 (Continued)

B-752

- 3. If the beginning date of aid originally established on an application is not in accordance with the legal provisions of the W&IC and a subsequent corrective action is taken beginning aid at an earlier date. The Federal Government participates provided the retroactive aid is not for a month(s) prior to the month of the original action and further provided that the corrective action is taken by the end of the second month following that in which the original action was taken.
 - Example 1: An application which was signed on July 15 was approved by the board of supervisors on September 15, aid to start effective October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of the W&IC. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is federal participation in the warrant issued in November for September as there would have been no retroactive initial payment if the original action in September had been correct.
 - Example 2: An application which was signed on June 15 was approved by the board of supervisors on October 15, aid to begin October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of the W&IC. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is no federal participation in the aid paid in November for September as the original board of supervisors action occurred in October. Had aid been correctly approved from September 1 in October, there would have been no federal participation as the initial payment would have been retroactive.

B. Retroactive Payments

Federal participation is available for retroactive aid in the following situations:

1. Increased Payment

If a payment of aid has been made in accordance with the authorized award and is later found to be less than the amount for which the recipient was eligible. The Federal Government participates in additional payments authorized before the end of the second month following that in which the underpayments occurred.

2. Correction of Erroneous Payment

- a. If a payment in a particular month is made for less than the authorized award for that month and the error is corrected by delivery of an additional warrant within a three-month period, including the month in which the erroneous payment was made. No action of the board of supervisors is necessary.
- Example 3: The authorized award for January is \$40. Through error only \$30 is paid on January 1. The additional \$10 may be paid later in January, in February or not later than March 31. No change in the award is made to correct the underpayment.

B-751 FINANCIAL PARTICIPATION -- STATE AND COUNTY

References to state and county financial participation in aid payments will also be found in the following sections of the manual:

P 750	FEDERAL PARTICIPATION IN ANB			B-752
	RESIDENCE REQUIREMENTS FOR COUNTY FINANCIAL PARTICIPATION.	• •	٠	B-319
	REIMBURSEMENT WHEN RESIDENCE IS CHANGED WHILE APPLICATION IS PENDING			B-150
	REIMBURSEMENT WHEN REAPPLICATION IS TAKEN IN COUNTY OF NON-RESIDENCE			B-367
	REIMBURSEMENT FOR NON-COUNTY AID IN INTER-COUNTY TRANSFERS			B-706
	REIMBURSEMENT FOR NON-COUNTY AID			B-322
	FINANCIAL PARTICIPATION IN INTER-COUNTY TRANSFERS			B-703

There is no federal participation in APSB

A. Initial Payments

The first payments made on new applications and restorations are initial payments. Federal participation is available in initial payments provided the board of supervisors' action occurs within the month for which the aid is granted and the warrant is delivered during the same month or not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. Federal participation is also available in initial payments as follows:

- 1. If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, plus the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.
- 2. If an application for aid has been improperly denied and such action is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action was taken and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.

B-752 (Continued)

B-752

Example 5: An ANB application was signed on July 5. The 90-day period ended October 3. The application was granted by the board of supervisors on November 8. Aid is paid from October 1. There is no federal participation in the payment made in November for October.

Example 6: Application for ANB is signed on August 5. The 90-day investigation period expires
November 3. Determination that applicant is eligible is not made by the board of supervisors
until January 10, when aid is approved to begin November 1, the first of the month during
which the 90-day period expires. There is no federal participation in the ANB payments made
in January for November and December.

C. Hospitalization

Federal participation is available for a recipient receiving medical or surgical care in a public medical institution in accordance with Sec. B-521, Recipients in Public Medical Institutions--Federal Reimbursement.

D. Guardianship

There is no federal participation in payments made to a guardian who is and employee of the SDMH. (See Sec. B-155, Guardianship.)

E. Aid in Kind and Restricted Payments

Neither federal nor state participation is available in aid payments which are restricted, or for aid given in kind. (See Sec. B-605, Money Payments and Restrictive Payments.)

(Walc 3075, 3087, FSS-Admin.)

B-754 FEDERAL PARTICIPATION BASIS AND ONLY

B-754

The maximum basis for federal participation is \$50. The federal share is: 3/4 of \$20, plus 1/2 of the difference between the amount paid (not counting excess over \$50) and \$20. If the grant is less than \$20, 1/2 of the difference between the grant and \$20 is deducted from 3/4 of \$20. The maximum federal share is \$30.

The short formula for computing the federal share is: 1/2 the amount paid (not counting excess over \$50) plus \$5.

Example A: ANB grant \$80, federal basis \$50

Regular formula

 $3/4 \times $20 = 15.00 $1/2 \times ($50 - $20) = $30/2 = 15.00

Federal Share # \$15 + \$15 = \$30.00

Short formula

Federal Share = $(5 \times $50) + $5 = $25 + $5 = 30.00

B-752 (Continued

B-752

b. If a payment is made in excess of the authorized award. The Federal Government participates in the excess payment only if the amount of the excess is taken into consideration in the payment for either of the two months following the month in which the overpayment was made. No change in the authorized award should be made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the authorized award for each month.

Example 4: The authorized award in ANB is \$50. Through error \$60 is paid in January. In February or March \$10 less than the authorized award is paid to adjust for the \$10 overpayment in January. No change in the award is made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the maximum basis of \$100 for the two months.

3. Delayed Payment

If a grant of aid has been properly authorized but either the issuance or release of the warrant has been delayed in such situations as are described in:

- a. Items 4 and 6 of Sec. B-630, for initial warrants.
- b. Items 3 through 8 of Sec. 630, for other warrants.

The Federal Government participates provided the payment is released within the two months following the month for which delivery was not made.

4. Payment with Respect to an Erroneous Discontinuance

If an erroneous discontinuance is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action is taken and the two preceding months.

5. Appeals to SSWB

If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, in addition to the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.

Federal participation is not available for retroactive payments for any months between the expiration of the 90-day eligibility determination period and the month(s) in which aid is authorized except if aid has been improperly denied and such action is later rescinded, provided such period does not antedate the month in which payment was improperly denied or withheld.

B-756 (Continued)

B-756

- 5. The blind person is bedfast and the cost of transportation of the ophthalmologist or neuropsychiatrist to the home of the blind person is incurred by the county, or
- 6. The blind person requires an attendant to accompany him to the examiner's office. (Waic 3075, 3087, FSS-Admin.)

B-758 FINANCIAL PARTICIPATION CHARTS

B-758

ANB 627-10

	MAXIMUM	MAXIMUM FEDERAL	RATIO OF	PARTICIPATION	
PERIOD COVERED	GRANT	BASIS	FEDERAL SHARE	STATE SHARE	COUNTY SHARE
7/1/50 thru	\$85	\$50	1/2 up to \$50 plus \$5	3/4 of Remainder	1/4 of Remainder
1/1/49 thru 6/30/50	85	£50	1/2 up to \$50 plus \$5	Remainder	None
10/1/48 thru 12/31/48	80	50	1/2 up to \$50 plus \$5	3/4 of Remainder	1/4 of Remainder
10/1/47 thru 9/30/48	75	45	1/2 up to \$45 plus	3/4 of Remainder	1/4 of Remainder
3/1/47 thru 9/30/47	65	45	1/2 up to \$45 plus \$2.50	1/2 of Remainder	1/2 of Remainder
10/1/46 thru 2/28/47	60	45	1/2 up to \$45 plus \$2.50	1/2 of Remainder	1/2 of Remainder
9/15/45 thru 9/30/46	60	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
1/1/40 thru 9/14/45	50	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
7/1/36 thru 12/31/39	50	30	1/2 up to \$30	1/2 of Remainder	1/2 of Remainder
8/14/29 thru 6/30/36	50	. 0	None	1/2 of Grant	1/2 of Grant

Example: The following shows the federal, state, and county contributions for the indicated grants, in accordance with the above chart.

GRANT	FEDERAL SHARE	STATE SHARE	COUNTY SHARE
\$85.00	\$30.00	\$41.25	\$13.75
70.00	30.00	30.00	10.00
17.00	13.50	2.63	•87

B-754 (Continued)

Example B: Grant \$17, federal basis \$17

Regular formula

 $3/4 \times $20 = 15.00 $\frac{1}{2} \times ($17 - $20) = -$3/2 = 1.50 Federal stare = \$15.00 - \$1.50 = \$13.50

Short formula

Federal share = $(\frac{1}{2} \times $17) + $5 = $8.50 + $5 = 13.50

Example C: Grant \$4, federal basis \$4

Regular formula

3/4 x \$20 = \$15.00 1/2 x (\$4 - \$20) = - \$16/2 = \$ 8.00 Federal share = \$15.\$8 = \$ 7.00

Short formula

Federal share = $(1/2 \times $4) + $5 = $2 + $5 = 7.00

(W&IC 3025, 3087, FSS-Admin.)

B-756 FEDERAL PARTICIPATION IN ADMINISTRATIVE COSTS AND ONLY

B-756

There is no state participation in administrative costs

Federal participation in county administrative costs is claimed on the basis of one-half of the actually incurred costs of administration for:

- a. Aid to Needy Blind cases and
- b. Recognized services reasonably related to the ANB program.

Expenditures for Eye Examinations ANB only

Federal participation may be claimed for cost of required eye examinations for ANB.

Necessary expenses to county for transporting an applicant for or recipient of ANB to obtain the required eye examination are administrative expenses, Subjuect to federal reimbursement provided:

- 1. The applicant or recipient is not financially able to meet such costs, and
- 2. There is no accessible ophthalmologist on the panel or no neuropsychiatrist in the county and the person must be transported to another county or state, or
- 3. Transportation to another county or state is necessary for examination by an ophthalmologist who had not previously examined the person, or
- 4. The distance to the nearest accessible ophthalmologist on the panel or neuropsychiatrist in the county is great and transportation to his office is necessary, or

(Section Continued on Next Page)

645-00

-31

B-758 (Continued)

APSB

	MAXIMUM	RATIO OF	PARTICIPATION
PERIOD COVERED	GRANT	STATE SHARE	COUNTY SHARE
2/1/49 thru	\$85	5/6 of Grant	1/6 of Grant
10/1/47 thru 1/31/49	75	5/6 of Grant	1/6 of Grant
3/1/47 thru 9/30/47	65	1/2 of Grant	1/2 of Grant
9/15/45 thru 2/28/47	60	1/2 of Grant	1/2 of Grant
7/1/41 thru 9/14/45	50	1/2 of Grant	1/2 of Grant

(WAIC 3025, 3042, 3084, 3087, 3087.1, 3420, 3432, 3472, 3480, FSS-Admin.)

B-766 (Continued)

B-766

In any case where an application for aid has been denied, a new application is not required for the purpose of eye care, regardless of the length of time which has elapsed. The following are, however, required:

- 1. An up-to-date Physician's Report of Eye Examination, Form Bl 227.
- Current information to establish eligibility. (Waic 3051, 3075, 3460, 3462)

B-769 REQUEST FOR TREATMENT AND INTERPRETATION TO THE INDIVIDUAL

B-769

The SDSW may provide for treatment or operations to prevent blindness, or restore vision to applicants or recipients who voluntarily request and make written application for such treatment or operation.

Such request is made by the individual by completing a Request for Treatment, Form Bl M524. A careful interpretation by the county worker must be given the individual before he signs the request. Every effort should be made to give a full explanation of the opportunity which treatment affords the individual. Final decision to accept or reject the opportunity for treatment or operation must be made entirely by the individual.

It is particularly important that when the blind person is a recipient of ANB or APSB, he be told that vision may be restored whereby eligibility for aid to the blind may no longer exist.

B-772 ELIGIBILITY FOR PREVENTION OF BLINDNESS

B-772

A person is eligible for eye care under the program if his eye condition is such that treatment or operation may either restore vision or prevent further loss of sight as determined by the Advisory Committee of Ophthalmologists, or a physician designated by that committee, and when:

- 1. His age, physical, and mental condition will make eye care profitable to him;
- 2. He is neither receiving eye care from any physician, clinic, or hospital, public or private, nor made prior commitments to any surgeon or institution (unless a signed release is presented);
- 3. He is a recipient of ANB or APSB;
- 4. He is an applicant for ANB or APSB and meets all the eligibility requirements for such aid except with respect to blindness in that the degree of vision does not have to be within the definition of economic blindness as defined in Sec. B-246, Definition of Blindness. (Walc 3051, 3075, 3460, 3462)

185-25, 185-00 185-10, Restated Repeated, 185-20

B-763 PURPOSE OF PREVENTION OF BLINDNESS

A study of the causes of blindness in California reveals that there are many blind persons throughout the state, among applicants for and recipients of Aid to the Blind, whose vision could either be restored or further loss of eyesight prevented by adequate treatment.

In 1939, the Legislature enacted Section 3051 of the W&IC which authorized the SDSW to:

"provide for treatment or operations to prevent blindness, or restore vision to applicants for, or recipients of, aid to the blind who voluntarily request and make written application for such treatment or operation.

"This service shall be extended only to those persons whose age and physical and mental condition will make such physical rehabilitation profitable to the individual, shown by the findings of the physician in the report of the eye examination to be eligible for such treatment, and recommended for such treatment after a full investigation of each case by the advisory committee of ophthalmologists or by an ophthalmologist who has been designated by the advisory committee...."

A medical program designed to prevent blindness, or improve or restore vision has immeasurable value to the individual and to society. To the blind person, the effect of successful treatment is well-nigh inspirational. To his relatives, it means a release from anxiety and responsibility. To the public, the program is of great value in the conservation of funds because in many instances a blind person whose vision is improved or restored may no longer be dependent on aid.

B-766 SELECTION OF CASES

B-766

Selection of individuals who might benefit by treatment is made from the physicians' reports of eye examination on file in the SDSW from referrals by the county welfare department or otherwise. Authorization to proceed for treatment must be secured from the SDSW prior to any commitment. (See Secs. B-784, General Procedures, and B-772, Eligibility for Prevention of Blindness.)

185-05 Restated 185-15

If an individual expresses an interest in eye care, the county shall request the SDSW for authorization to make an appointment for an eye examination either by the State Ophthalmologist or by an ophthalmologist selected by the SDSW. The State Ophthalmologist will review all eye examination reports.

185-2

B-781 COUNTY PARTICIPATION IN PROGRAM

B-781

While the administration of the prevention of blindness program is a direct state responsibility, county participation at several vital points is essential to make the program truly statewide, achieve the maximum benefit to the individual, and make the most economical use of funds.

County participation is essential for such services as:

- 1. Designation of a social worker from the county welfare department staff who will:
 - a. Discuss the possibility of eye care with the individual selected and determine his wishes regarding care under the prevention of blindness program.
 - b. Determine according to Sec. B-772, Eligibility for Prevention of Blindness, that the individual is eligible to receive the medical care and confirm his eligibility to the SDSW.
 - c. Give any additional interpretation that may be indicated from time to time during the course of arrangements and treatment.
 - d. Give the individual assistance, if required, in completing the request for treatment, Form Bl M524.
 - e. Make arrangements for a physical examination by a general practitioner in the local community when necessary, or any other appointments with specialists.
 - f. Notify the individual of any appointment, i.e., with the State Ophthalmologist and/or other specialists, hospital, etc., and confirm these on request.
 - g. Assist the individual in making arrangements for transportation to the medical center and the return to his home. Whenever possible, advantage should be taken of special transportation rates for blind persons. (See Sec. B-796)
 - h. Assist the individual in preparing a claim for reimbursement by the SDSW for expenses involved in securing eye care, i.e., cost of transportation, meals, hotel, taxi fares, etc., when such expenses have been paid by the individual.
- 2. When necessary, defraying any costs incident to securing the treatment in behalf of the individual, subsequently securing full reimbursement therefor from the SDSW.
- 3. Preparing and forwarding a progress report, Form Bl M30, on request from SDSW containing a statement of the benefit gained by the individual after completion of the eye care. (See Sec. B-784, General Procedures; Sec. B-793, Allowable Expenses for Prevention of Blindness.) (Walc 3051, 3075, 3460, 3462)

CALIFORNIA-SDSW-MANUAL-AB

Effective June 1, 1951

B-775 TYPES OF TREATMENT

The following list indicates, in general, the types of treatment which may be authorized by the SDSW under the program:

Cataract (of the eye), Needling or Discission, Operation for Cataract, Operation for Corneal Ulcer, Extensive Peripheral, Cauterization Ectropion, Operation for Entropion, Operation for Glaucoma, Treatment and or Surgery for Iridectomy, Simple Iridectomy
Iridectomy plus paracentesis for glaucoma
Lacrymal Sac, Excision of, or Dacryocystotomy
Pterygium, Removal of
Retinal Detachment, Correction of

Request must be made to the SDSW for all treatment or surgery. Special request will be submitted to the advisory committee of ophthalmologists for recommendation for any treatment or surgery not listed in this section. The request shall include specific details with regard to the necessity for treatment or surgery. Enucleations will be performed only when removal is necessary to preserve the vision in the remaining eye. Surgery for cosmetic purposes is not authorized. Authorization may not be given for corneal transplant procedures. Although binocular surgery may sometimes be authorized, in general, surgery for one eye only will be authorized.

Since glaucoma is a condition which frequently requires emergent action, treatment should be provided through local medical facilities. The time required in securing authorizations and planning for the individual's care through the prevention of blindness program often negates the results of any treatment for glaucoma which might be provided by the SDSW.

In the event no local resources are available and the person is not able to assume financial responsibility for his own medical care, the SDSW can provide glaucoma treatment and/or surgery on the same basis as for other persons selected for care. (Walc 3051, 3075, 3460, 3462)

B-778 TREATMENT CENTERS

B-778

The SDSW advisory committee of ophthalmologists is required by law to designate the hospital or clinic in which eye care will be provided. The committee has determined that all surgery should be performed in the larger medical centers where the latest methods, techniques, equipment, and hospital accommodations are available, as well as a number of experienced surgeons.

185-30 Repeated 185-00

Whenever possible, authorization is given for medical or refractive services in the local community. (Waic 3051, 3075, 3460, 3462)

B-787 SERVICES OF TRAVELERS AID SOCIETY

B-787

The Travelers' Aid Society may extend their services to the blind person who is traveling alone or who is accompanied by someone who is not familiar with large cities, and who is traveling outside his county of residence. In planning for the blind person, the county is asked to advise the agency as far in advance as possible of the following:

- 1. Name and address of the blind person.
- 2. Brief description to include any distinctive physical characteristics for purposes of identification.
- 3. Method of travel—train or bus, and the name of the line on which the person will be traveling; the time of departure from city of residence and scheduled time of arrival.
- 4. Destination and purpose of trip.
- 5. Time of appointment with the surgeon, and his name and address.

If it is necessary to change train or bus enroute, the county is asked to request assistance of the Travelers' Aid Society in the city where such change is made.

B-790 EYE CARE BY OTHER SMATE DEPARTMENTS

B-790

Department of Health

Under the program for Services for Crippled Children administered through the State Department of Health, medical, surgical, corrective, and other services and care, including diagnosis, hospitalization, and after-care may be provided for children up to 21 years of age. This includes severe visual defects requiring surgical intervention.

Department of Education-Bureau of Vocational Rehabilitation

Under the physical Restoration program administered by the Bureau of Vocational Rehabilitation, corrective surgery or medical treatment, if required to enable the individual to become vocationally feasible, may be provided. In general, those blind persons, or those threatened with blindness and who are between the ages of 21 and 50 years are referred to the Bureau of Vocational Rehabilitation for eye care. Through this agency, training may also be given in any occupation for which the individual may be fitted.

185-60

B-784 GENERAL PROCEDURES

If, upon review of a physician's report of eye examination by the State Ophthalmologist, it is found that the eye condition is such that treatment or surgery might restore vision or prevent further loss of vision, the county will be notified of such finding and be requested to arrange for a diagnostic examination by a physician designated by the SDSW. The designated physician or the county will be asked to secure the individual's signature on the Request for Treatment, Form Bl M524, if the person wishes to take advantage of the opportunity for eye care offered by the SDSW.

If a physical examination is necessary before the diagnostic eye examination, the county will be asked to arrange with the individual for a complete physical examination by his own family physician or a physician of his choice. The report of this examination on Form Bl M25 should be forwarded to the SDSW after it has been completed and signed by the examining physician.

If the individual's physical and eye conditions indicate feasibility for eye care, the individual will be assigned to one of the surgeons on the panel selected for this program. The panel surgeon will be authorized by the SDSW to proceed and is responsible for (1) making hospital reservations, (2) making an appointment for the individual to be seen in the surgeon's office (this appointment to coincide with the date of hospital reservation), (3) notifying the individual (copy to county) of the date and hour of appointments, and (4) securing from SDSW authorization for nursing home care, if needed.

Authorization of Hospitalization, Form Bl M29, will be given the individual by the panel surgeon for presentation to the hospital. (See Sec. B-778, Treatment Centers.)

An eye examination is required in all post-operative cases in not less than 90 or more than 120 days after surgery. This post-operative eye examination is made by the operating surgeon or a physician designated by him, at which time the individual is refracted and glasses are provided when required. The post-operative examination may necessitate a return trip to the surgeon's office. A report of this examination on Form Bl 227 is submitted by the surgeon to the SDSW and, after review by the State Ophthalmologist, a copy of the Physician's Report of Eye Examination (Form Bl 227) is sent to the county. If the individual was a recipient prior to surgery, a letter from the SDSW concerning continued eligibility to aid will accompany county's copy of the report.

While the post-operative report of eye examination indicates the measured amount of visual acuity as a result of the surgery performed, a translation by the county of this measurement into terms of what the return of sight has meant to the individual is requested by the SDSW after a period of approximately six months has elapsed following surgery. Progress report, Form Bl M3O, has been devised for the use of the counties for this purpose. This evaluation of the social worker and the patient as to the post operative adjustment may be the basis for determining the need for continuing medical care under the prevention of blindness program. (Wall 3051, 3075, 3460, 3462)

Repeated 185-15 Repeated 185-50

Meals—The maximum allowance for meals is \$4.00 per day. If separate meals are charged, a maximum of \$1.00 for breakfast, \$1.25 for lunch, and \$1.75 for dinner is fixed.

Per Diem Allowance In lieu of an allowance for hotel and meals, a maximum allowance of \$6.00 per day may be claimed.

Private Home Expense-If meals and lodging are charged a patient staying in a private home, the voucher should show the dates lodging covers, cost per day, meals itemized by day, and cost per meal. Receipts for lodging (European Plan) or board and lodging (American Plan) shall be furnished and shall show dates for which the charge is made. American Plan shall not exceed \$8.00 per day. The receipt must be made out to the patient or attendant and signed by the person furnishing the meals and lodging.

<u>Transportation</u>—No more than actual fare on any transportation service in accordance with the latest tariffs at the time the trip was made shall be allowed. Special rates and round trip shall be used whenever possible.

The Federal Interstate Commerce Act provides that a common carrier coming under provisions of that Act may carry any totally blind person accompanied by a guide or seeing-eye dog, or other dog specially trained and educated for that purpose, at the usual and ordinary fare charged for one person under such reasonable regulations as may have been established by the carrier.

State law provides that all blind residents of the state may be granted free transportation on all street cars. They may be permitted to travel on all other common carriers within the state for one-half the current fare. If any blind person is accompanied by a guide, the combined fare for such blind person and his guide may be fixed at not to exceed the current fare for an individual. The county is asked to provide the blind person with a letter to the common carrier indicating the need for this service.

Private Car-Reimbursement on a mileage basis for transportation by privately owned automobiles will be allowed where public transportation does not parallel the trip, or transportation by common carrier is not available, or where the charge claimed for mileage does not exceed the charge for common carrier fare. The maximum rate for the use of a privately owned automobile is $5\frac{1}{2}\phi$ per mile, irrespective of the number of persons occupying the automobile. Signed statements for private car transportation must accompany claim, and shall show the license number, total number of miles traveled, and the rate per mile.

Maximum Allowances—The fixing of maximum allowances does not authorize the filing of claims for sums in excess of expenditures. For periods less than a full day, the allowance shall be computed on the basis of actual expenditures not to exceed the maximum allowance for hotel, breakfast, lunch, and dinner. The specified dates for which allowances are requested shall be stated on the claim.

B-793 ALLOWABLE EXPENSES FOR PREVENTION OF BLINDNESS

Federal participation is available for expenditures for salaries and wages and mileage costs through the regular claims for reimbursement of administrative expenses procedure, when the services to individuals are reasonably related to the categorical aid programs, and the person is an applicant for or recipient of public assistance. The worker will charge her time according to the program under which the recipient is currently receiving aid, or if not receiving aid, to the program under which he is applying for aid. (See Sections on Financial Procedures in Manual of Policies and Procedures for references to county claims for reimbursement.)

The SDSW may authorize all necessary expenses in connection with the proAllowable expenses may include:

1. Diagnostic eye examination
2. General physical examination
3. Surgery and/or treatment

- Surgery and/or treatment
- Hospitalization
- 5. Medication
- 6. Nursing home care as needed and when recommended by the surgeon following hospitalization
- Transportation costs, hotel accommodations, and meals, for the blind person and attendant if an attendant is required.
- Refractions, and glasses in specific cases. (After the permanent refraction at the end of the post-surgical period (90 to 120 days after surgery), the state will not be responsible for expenses incurred by the patient for further examinations or treatment unless specifically authorized by SDSW.)

Complications which develop while the patient is in the hospital and which require immediate or emergency treatment shall be considered the financial obligation of the state. Such treatment, at the recommendation of the operating surgeon, shall be a proper charge against the funds appropriated for prevention of blindness. Prior to the patient's discharge from the hospital, the county will be asked to make arrangements for the continued care to be given through local resources in the county of the patient's residence.

The SDSW will pay the vendor direct for any other service rendered under this program by an individual, agency, or institution (physician or surgeon, hospital, nursing home, optician, etc.) (Ward 3051, 3075, 3460, 3462)

B-796 RULES ON TRAVEL EXPENSES

B-796

The following rules shall govern the expenses for the listed items, in connection with the Prevention of Blindness Program:

Hotels--Claims for hotel accommodations shall not exceed \$4.00 per day. If a guest shares a room with either the blind patient or the attendant, only the single hotel rate may be charged.

B-796 (Continued)

B-796

Travel Expenses of Attendant—If an attendant is required, expenses for hotel accommodations, meals, and transportation for such attendant may be claimed in accordance with these rules. Expenses for an attendant will be allowed only for the time that actual attendance on the patient is required. This may include round trips by common carrier for the purpose of assisting the patient on his return trip to his home where the need for such assistance exists.

Taxi Fares -- All claims for taxi fares must show the points between which the fare is claimed.

A. Vouchers and Receipts

Vouchers and/or receipts shall accompany expense claims except:

- 1. Railroad and stage fares where the fares are available in published tariffs
- 2. Meals
- 3. Street car, ferry fares, bridge and road tolls
- 4. Taxi or hotel bus fares

In case a receipt or voucher has been lost, a complete statement relative thereto shall be made on the expense account, except in the case of hotel vouchers. Duplicates of hotel vouchers must be secured.

B. Preparation of Invoices

All invoices shall be submitted in triplicate to the State Department of Social Welfare, 145 South Spring Street, Los Angeles 12, California, immediately after expenses are incurred. Every invoice shall be properly itemized before a claim is filed for payment.



Invoices may be submitted by the blind person or vendor on Form DFA 193, Treatments or Operations to Prevent Blindness, and shall be signed by the blind person, vendor, or person furnishing the supplies or service. If the signature of the person is by mark (X) the signature of a witness to the mark is required. If expenses of an attendant are included in the claim, the signature of the attendant is required.

Counties shall use Form AA 152 (Claim: Reimbursement to Counties - Treatmentsor Operations to Prevent Blindness) in claiming reimbursement for travel expense incurred for the blind person and attendant, when required. (WaIC 3051, 3460, 3462, State Board of Control Rules)

Sta	te of California			Depart	ment of Social Welfare
		INQUIF	RY FORM		
	FOR DETERMINI	NG PRESUMPTIVE ELIGIBILITY		OR O.A.S.I.	BENEFITS
1.	Name				
				Social Secur	ity Account Number
	Address of Applicant				
2.	Date of birthMonth_		Day	Year_	
	Place				•
	City or	town County	y S	State	Country
3.	*Record of employment	since December 31, 1936			
	Name of Employer	Address of Employer	From		То
-			Month	Year M	onth Year
	CONTRACTOR CONTRACTOR				
-					
-			Tarabba a casa cas		
		A South American			
4.	date of birth:	wife's maiden name, age, a			
5.	Have you any children, unmarried? Yes No	including stepchildren s	and legally adopted	children,	under 18 years of age
	If so, how many?				
6.	Have you previously fil	led an application for any	benefits under Tit	le II of the	Social Security Act?
	Yes No				
	If so, state the name of place where filed:	under which the application	n was filed, the ap	proximate d	ate filed, and the
	Name	Date Applic	eation Filed	City	State
him dur	quarters of coverage, prior to January 1, 193	ing age 65 before July 1, 1 However, if he attained ag 39, is not counted toward refore, only the employer	ge 65 prior to Janu benefits, and no o	or monthly b ary 1, 1937, warter of co	enefits upon acquiring remuneration paid to
nam	t of age 65 and prior to	ttained age 65, in 1937 or January 1, 1939, is not we period between the wage-	rages and is not co	unted toward	benefits. Therefore.
For	m DPA-2, April 1940				

State of California	Department of Social Welfare
REQUEST FOR FEDERAL OLD-AG	E AND SURVIVORS INSURANCE INFORMATION
Name of Wage Earner Date as	nd Place of Birth Account Number
Name of Claimant, if oth	er than Wage Earner Relationship
	Address
DIRECTOR, BUREAU OF OLD-AGE AND SURVIVORS IN	SURANCE:
ATTENTION: Manager	Date
	to produce a copy of an award or disallowance letter reference to a claim for benefits under Title II of the
of the above-named person to old-age and so The information requested herein is required mation will be used only for the purpose star or individual, except in accordance with expr	available from your records, regarding the entitlement urvivors insurance benefits, be furnished this office. for use in determining this person's needs. The inforted and will not be disclosed to any other organization essed regulations or instructions of the Social Security tration-approved State public assistance plan.
Signature	Title
Name of Organization	City State
SOCIAL SECUR (Name and Address of Agency) The records of this Bureau disclose	RITY ADMINISTRATION REPORT Date the following:
	Wage Earner's Account No
Date of Award	Name of Beneficiary
Type of Monthly Benefit	Amount of Monthly Benefit
Month of Entitlement Explanation of Any Necessary Deductions	Initial Payment
Date of Birth, if age 65 or over	Amount of Lump-Sum Death Payment
DisallowedDate	Reason
Date	DIRECTOR, BUREAU OF OLD-AGE AND SURVIVORS INSURANCE
	By
	Title
Form DPA-1, Revised, July 1949	

				FACE :	SHEET					
						Case N	umber.			
			-				-			
DATE	PRESENT ADDI	RESS	A	MOUNT RENT OR PAYMENT		LA	NDLORD	OR MORTGAGO	R AND ADD	RESS
FIRST N	IAME B	IRTH DATE		BIRTH PLAC	E	OCCUPA	TION	SOCIAL SE	CURITY ER	EDUCATION YEAR
Man										
Woman										
Children 1										
2										
3										
4										
5							-			
6										
8										186
9										
10										
OTHERS IN HOUSE	HOLD									
1	NAME	AGE	RELAT	TIONSHIP	OCCUP	ATION	AMOUN	IT INCOME	CONTRIBUT	ING TO HOUSEHOLD
1										
2										
3										
5										
6		MARRIAGE		SEI	PARATION		DIV	ORCE	1	DEATH
SPOUSE	DATE	PL	ACE	DATE	PLACE	Day	TR.	PLACE	DATE	PLACE
Man										
W.										
Woman						-	-		-	

FORM DPA 4 (Revised)—February, 1947

FORM DPA-3, April 1940 State of California Department of Social Welfare

INQUIRY FORM

FOR DETERMINING PRESUMPTIVE ELIGIBILITY OF OTHER THAN A WAGE-EARNER FOR 0. A. S. I. BENEFITS

	Name of Deceased	We go - Fe senes			Social Secur	ity Account Number
					Dooral Beour	toy Account Manner
1.	Name of Applicant					
	Address of applicant_				74	
2.	Relationship to decease	sed wage-earne	r			
	If widow, state when	and where you	and the wage	earner wei	re married:	
	Month_					
3,	Deceased wage-earner	was born: Mon	th		Da.y	Year_
	PlaceCity or	Томп	County		State	Country
4,	Date of his death: M	onth			Day	Year
	PlaceCity or	Tourn	County		State	Country
5.	Date of birth of appl	icant: Month	1 - 7 ₀ - 1		Day	Year
	PlaceCity or	Mount	County		State	Country
		,				country
6.	*Record of employment	of deceased wa	age-earner s	ince Decemb		
	NAME OF EMPLOYER	ADDRESS OF	EMPLOYER	MONTHAL	FROM	TO WOMEN
	•			MONTH	YEAR	MONTH YEAR
,						
7.	State below the name and legally adopted ch					including stepchildren
	FULL NAME OF CHILD	DATE OF E		NAME, ADDR WHOM TH	ESS, AND RELATI E CHILD WAS RES WAGE-EARNER'S	ONSHIP OF PERSON WITH SIDING AT TIME OF DEATH
	*If the dec	eased was 65 ye	ears of age	before Jar	nuary 1, 1937,	name only the employers

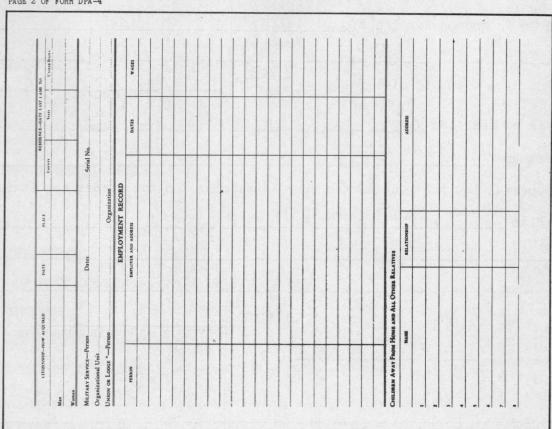
*If the deceased was 65 years of age before January 1, 1937, name only the employers for whom he worked on and after January 1, 1939, as remuneration paid to the wage earner subsequent to December 31, 1936, and prior to January 1, 1939, is not considered wages, and no quarter of coverage can be acquired during this period. If the deceased wage-earner's sixty-fifth birthday occurred in 1937 or 1938, do not include the names of his employers for the period between his sixty-fifth birthday and January 1, 1939, as remuneration paid to him during this period is not considered wages, and no quarter of coverage can be acquired.

Form DPA 5, January 1942 State of California Department of Social Welfare SUMMARY OF LETTERS OF GUARDIANSHIP	CASE NAME
SUMMARY OF LETTER	S OF GUARDIANSHIP
County Name State	Number Category
tain the following information:	f guardianship were reviewed and con-
l. Onle	tters of guardianship were issued
2. ToName of guardian	who was appointed
3. Guardian of the	
4. Of	e of ward
5. ByName	
Evidence is in the possession of	
Is the guardian a public official? Yes o	
Give title of position	
and Department	
and any special instructions of the cou	rt appearing in the order appointing
the guardian	
	SIGNED) Signature of worker reviewing evidence
Da te	Promotion and water realesting anddeuge

PAGE 3 OF FORM DPA-4

PERSONAL PROPERTY PROME PROME PROPERTY	OFFICE OF	Deer Cours I incarrow Configure To which the standard property and address and address and address and address and address and address and bonds 5. Bank account 5. Bank and address and bonds 5. Company. Value Assessed value Encumbrance and address and address and address and bonds 5. Company. Noticed Deer Cours and Bonds 1 year. Noticed Deer Personal property. Noticed Deer Personal Property Addition of Inquiry relating to the political or religious ogin population or inquiry relating to the political or religious ogin population or inquiry relating to the political or religious ogin population or inquiry relating to the political or religious ogin population or inquiry relating to the political or religious ogin population or inquiry relating to the political or religious ogin population or inquiry relating to the political or religious opin population or inquiry relating to the political or religious opin population or inquiry relating to the political or religious opin population or inquiry relating to the political or religious opin population or inquiry relating to the Personal Person	Other Other Other Other Other Other Other Other Other personal property. Other personal	Formary Control	ъ	
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PAGE 2 OF FORM DPA-4



		State Number.	
		County Number	
		Former Scace N	lumber, If a Transfer or Reapplication
APPLICATION	FOR AID TO T	HE BLIN	D
TATE OF CALIFORNIA—County of			
To the Honorable Board of Supervisors:			
	residing at		
Print or Type None in Pull			D. (If in institution give name)
City, County o	of	, (California, herewith appl
or Aid to the Blind. To the best of my knowled wit:	ledge and belief I am elig	pible for	Aid to Needy Blind Aid to Partially Self-Supportin Blind Residents
1. Blindness: I am blind to the extent-Totally			And Attaching
	vn		since
2. Age: I have attained the age of sixteen years. Birthdat			
3. Residence: A. I have resided in California since			, 19
B. I have resided in the County of		since	, 19
C. I have resided in the following count	얼마 보는 그 그림에 가는 얼마 보는 사람들이 사용했다.		
NAME OF COUNTY	FROM DATE		TO DATE
4. Real Brancastre, Land/or my annua ann and annuar	Home	County Am	S Encumbrance of Record
4. Real Property: I and/or my spouse own real property	Home	County Am	S Encumbrance of Record
	ty in the amount of: Other	County Am	S Encumbrance of Record
5. Personal Property: A. I own personal property as f	ty in the amount of: Other	County An	
	ty in the amount of: Other	County Am	ALUE ENCUMBRANCE OF RECO
5. Personal Property: A. I own personal property as f	ty in the amount of: Other	County An	
5. Personal Property: A. I own personal property as f	ty in the amount of: Other	County An	ALUE ENCUMBRANCE OF RECO
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FORMS

FORMS

State of California	Department of Social Welfare
NOTICE TO APPLICANT WHO W	VITHDRAWS APPLICATION
Toe	County

In accordance with your request of________,

Date
that your application be withdrawn, no action has been taken on your application for______.

If there should be a change in your circumstances or you should again desire to apply for aid, you have the right at any time to make another application.

Signature of County Worker

County No.____

District____

Form DPA 8, August 1944

STATE OF CALIFORNIA

If Non-county Case
Check bere

CERTIFICATE OF VERIFICATION OF ELIGIBILITY FOR AID TO THE BLIND

APPLICANT'S NAME (GIVE FULL NAME AS ON FORM BL 200)	COUNTY NUMBER FORMER STATE NUMBER IF 4 STATE NUMBER TRANSPER OR REAPPLICATION
Eligibility Requirements	Evidence of Eligibility
A. Evidence of degree of blindness ob-	1.
B. Became blind while a resident of Cali-	
fornia Yes or No	2.
2. Age—Has attained the age of 16 years Yes or No	
A. Has State Residence	
R Has County Residence	3.
C. Date residence began in present county	
4. Need	
A. Real Property	
(1) Applicant and/or spouse have own home county assessed value	
of	7. A.
(2) Applicant and/or spouse own	
property other than the home Yes or No (A) County Assessed Value . \$	
(B) Encumbrance of Record . \$	
(C) Property other than sepa-	
rate property of spouse utilized	
(Specify type of property)	
B. Personal Property	
or Recomb	В
(2) Applicant and spouse own the following personal property (This item to be completed only if this certificate refers to an application for ANB and the spouse of the applicant is applying for or receiving	
property (This item to be completed only if this certificate refers to an application for ANB and the spouse of the applicant is applying for or receiving ANB): Type Market Value Encumbrance	
property (This item to be completed only if this certificate refers to an application for ANB and the spouse of the applicant is applying for or receiving ANB):	
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property (This item to be completed only if this certificate refers to an application for ANB and the spouse of the applicant is applying for or receiving ANB): Type Market Value Encumbrance of Records	
property (This item to be completed only if this certificate refers to an application for ANB and the spouse of the applicant is applying for or receiving ANB): Type MARKET VALUE ENCUMBRANCE OF RECORD C. Applicant Has Net Income as Follows:	C
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I solemnly swear (or affirm) that the statem knowledge, information and belief, and if aid is grani transactions of myself or shouse, of any change in massist to the best of my ability in disclosing all inform Board of Supervisors.	ents made bei ted, I will no arital status, nation necessa	rein which hav tify the count financial cond ary in the pref	y authorities p itions, address, paration of my	romptly of any or plan for self- application for	real or perso -support. Als a recommend	ne best of my nal property o, I agree to lation to the
NOTE.—When the applicant can not sign his name, the signature of two witnesses to his mark must appear.			Signatu	are or Mark of Appli Witness to Mark	cant	
				Witness to Mark		
Subscribed and sworn to before me this	day of			, 19		
Name	gislature, pro- it of a person is is, or any politic on in connec- earing before et, Sacramen	necessary in order al subdivision the tion with you te the Board ato.	ur application of Supervisor	n, or if you w	ish to prote	est delay in
Forms Bi 201	and Bl 230 (an	d Form Bl 204 v	rhen required).	,		
						marky.
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County assessed value Encumbrances Monthly taxes and/or assessments Cross income County assessed value Encumbrances Monthly taxes and/or assessments Cross income County assessed value Encumbrances Monthly taxes and/or assessments Cross income Cross i			Cou	NTY No
Birthdate. Marital Status If married, date of marriage. 1. BLINDNESS Has applicant had eye examination?. Date of latest physician's report (Form Bl 227) on file. 2. RESIDENCE Date last came to California. Date last came to County. Total number years residence in California. Lecality Years To 3. REAL PROPERTY, APPLICANT AND/OR SPOUSE (Indicate by symbols (A) or (S) which, if any, of following property belongs to Applicant or Spouse superarts property. Home Other Than Home Other Th			STAT	E No
Marital Status Eagle Marital Diversit Separate Separate	Applicant's Name	ADDRESS		
If married, date of marriage. 1. BLINDNESS That applicant had eye examination?	Birthdate			
If married, date of marriage 1. BLINDNESS Has applicant had eye examination? Date of latest physician's report (Form Bl 227) on file 2. RESIDENCE Date last came to California. Lecality Date last came to County. Total number years residence in California. Lecality Years From To 3. REAL PROPERTY, APPLICANT AND/OR SPOUSE (Indicate by symbols (A) or (S) which, if any, of following property belongs to Applicant or Spouse separate property. Home Other Than Home Other Than Home Other Than Home Other Than Home County assessed value Encumbrances Monchly payments Monchly tases and/or assessments Gross income Is property being utilized? 4. PERSONAL PROPERTY (It is assumed that the applicant has a community interest in spouse's personal proper unless facts established such property as separate.) Include applicable insurance and but trust terms. Set 3 and 5 below. PERSONAL PROPERTY (It is assumed that the applicant has a community interest in spouse's personal proper unless facts established such property as separate.) Include applicable insurance and but trust terms. Set 3 and 5 below. Description A. Community property (Total value of all property owned spindty by applicant of all postery) Total Applicant's separate property (in which applicant's interest in community property B. Applicant's separate property (in which applicant as in interest) Total C. Total value of applicant's property (½ community plus separate property) If the applicant's an interest) Total E. Combined property (all community property plus separate property of each spouse) Total E. Combined property (all community property plus separate property of each spouse) S. INSURANCE (Life) Name of company On Applicant On Applicant Date of policy Total can against policy Monthly premium pair Premium pair bolicy Monthly premium pair Premium pair boly Amount 1. Transfer of PROPERTY Has applicant made a transfer of real or personal property to qualify for aid? Yes No If yo, explain In North Part Part Part	Marital Status			
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		County	
		Case Name	
		County N	
		State No	
Applio	cant's Affidavit (For use of applicant who is a or Sections 3042 and 3432		
This Is To Ces	erify, That I,		
noved to the County of		_, State of Californ	iia, on
			in the following counties:
COUNTY	FROM (Date)	TO (Date)	REASON FOR CHANGE
			The second secon
	_		-
manual on objections— 4	or the following second		
moved to this county f	or the ronowing reason		
decided to make my re	sidence in this county o	0	
The state of the s		Date	
NOWE WILL II.	1.	Sie	gnature or Mark of Applicant
NOTE.—When the applic	ures of two witnesses		
to his mark must	appear.		Witness to mark
			Witness to mark
Subscribed and sworn to	before me this	lay of	19
Name	Tit	le	
Signature of person author	ized to acknowledge an affidavit		
	ed copy thereof shall be submi	tted to the State Departm	sent of Social Welfare with the application fo
oncounty sid.			
Section 6105, G	overnment Code, provi	des: "Whenever an	oath or affidavit is necessary in orde
that a person may obtain	in charity or relief from	m any agency or de	partment of the United States, th
hat a person may obtain	in charity or relief from	m any agency or de	oath or affidavit is necessary in orde epartment of the United States, the or the taking of the oath."
hat a person may obtain	in charity or relief from	m any agency or de	partment of the United States, th

FORMS

	What changes have made it i	esles ées sid?				
1	Has applicant had military se Is applicant in receipt of com Allowance Act?	ervice of a nature which mi pensation for military servi	ght reasonably er ce of others, inclu	ntitle him to mili uding awards und	tary benefits?_ ler the Servicem	en's Dependents
	Applicant's Social Security N Is employment record such t	Number is	OASI is a possibil	ity? Yes 🗆 1	No □ If so, h	as eligibility for
	same been determined?		Bald Services		CONTRACTOR AND	
1	Is there evidence of current n	eed in excess of maximum g	rant? (ANB only	y)If	so, indicate nat	ure and amount,
1	LEGALLY RESPONSIBLE	RELATIVES—(Spouse,	parents, adult cl	hildren)		
				Date Relative Statement Sent	Date Relative	
	Name	Address	Relationship	(If living in State)	Statement Returned	Contribution to Applicant
	STORY SALES SEEDING					
	Which relatives, if any, are f	inancially able but are not	contributing to	the extent of the	er financial abil	ity?
ĺ						
	INSTITUTIONAL INMA	TE				
1	Is applicant an inmate of a (check one) Public instituti	on	Private institution	on eligible to ai	d
	Private institution ineligible	to aid Probab	le discharge date			
-						
	Name and address of institut		•			
	Name and address of institution of admission REHABILITATION Is applicant interested in rece	tioniving special training?		n learning to read		
	Name and address of institut Conditions of admission	iving special training? ut is not following a plan fo nployment?	r rehabilitation, v	n learning to read what efforts are bo	eing made to ass	ist him in secur-
	Name and address of institute Conditions of admission	iving special training? ut is not following a plan fo nployment?	r rehabilitation, v	n learning to read what efforts are bo	eing made to ass	ist him in secur-
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	Name and address of institut Conditions of admission	iving special training? ut is not following a plan fo nployment?_ Aid to Partially Self-Suppo	Trehabilitation, v	n learning to rea what efforts are bu	eing made to ass	ist him in secur- nplated plan for
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1. F	Blind	Iness. Date of latest physician's report	Reexamin	nation necessary
2. 1	Real	Property.		Tes or No
		Recipient and spouse have home county		
	,	assessed value of		
		Encumbrance of record \$		
	(B)	Recipient and/or spouse own property		
		other than the home Yes or No		
		(1) County Assessed Value \$		
		(3) Property other than separate prop-		
		erty of spouse is being utilized Yes or No		
		Specify type of property		
3, I	Pers	onal Property.		
	(A)	Recipient owns the following personal property:		
		Type ' MARKET VALUE ENCUMBRANCE OF RECORD		
	(R)	Recipient and spouse own the following personal property		
	(-)	(This item to be completed only if this is a reinvestigation		
		of an application for ANB and the spouse of the recipient is applying for or receiving ANB):		
		Type Market Value Encumbrance of Record		
4. 1	Inco	Current monthly net income	Total net income durin	
4. 1	Inco		Total net income durir Source	ng past year Amount (net)
4. 1	Inco	Current monthly net income		
		Current monthly net income Source Amount (net) \$		
		Current monthly net income		
		Current monthly net income Source Amount (net) \$	Source	Amount (net)
		Current monthly net income Source Amount (net) \$	Source	Amount (net)
5.	Spec	Current monthly net income Souce Amount (net) \$	Source	Amount (net)
5.	Spec	Current monthly net income Source Amount (net) \$	Source	Amount (net)
5.	Spec	Current monthly net income Souce Amount (net) \$	Source	Amount (net)
5. :	Spec	Current monthly net income Souce Amount (net) \$	NATURE	Amount (net)
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				DEPARTMENT OF SOCIAL WELFARE
Recipient's	Affirmation of	Eligibility fo	or Aid to th	e Blind
T.		, residing at		
Print or	Type Name in Full		Street Number or R.F.D.	(If in Institution, Give Name)
City of	, County of		, Ca	lifornia, herewith affirm that I
Aid	d to Needy Blind d to Partially self-supportin	g blind residents to wit:		
		Home	\$	\$
1. I and my spouse own real proper	ty in the amount of:	Other	\$ County Assessed Valu	\$
2. I own personal property as follo	ows:			
	ONAL PROPERTY	MARKET	VALUE	ENCUMBRANCE OF RECORD
3. I and my spouse own combined	personal property as follo	ws: (Complete this item	only if you are reco	eiving Aid to Needy Blind and
your spouse is also applying for o		MARKET	V	ENCUMBRANCE OF RECORD
Type of Pers	SONAL PROPERTY	MAKKET	VALUE	EACOMBRANCE OF RECORD

4. Since my last application for Aic	d to the Blind:	Home	76.	
(A) I and/or my spouse have	acquired real property:		County Assessed Valu	Encumbrance of Record
		Other	County Assessed Valu	Encumbrance of Record
(B) I and/or my spouse have	disposed of real property c	onsisting of: (Describe	property disposed o	f)
			\$	Encumbrance of Record
(C) I have acquired personal p	roperty consisting of: (Des	cribe personal property		Encumbrance of Record
(C) I have acquired personal p	roperty consisting of: (Des	cribe personal property		Encumbrance of Record
(C) I have acquired personal p	roperty consisting of: (Des	cribe personal property	acquired)s	Encumbrance of Record
			\$Market Value	Encumbrance of Record Lacumbrance of Record
(C) I have acquired personal p			\$Market Value	\$ Encumbrance of Record \$ Lacumbrance of Record
			\$Market Value	\$ Encumbrance of Record \$ Encumbrance of Record
(D) I have disposed of persona			\$Market Value	\$ Encumbrance of Record \$ Encumbrance of Record Encumbrance of Record
(D) I have disposed of persona	al property consisting of: (Describe personal proper	\$strict Value ty disposed of) Market Value	\$ Encumbrance of Record \$ Lacumbrance of Record
(D) I have disposed of persona	al property consisting of: (the Blind): thy net income	Describe personal proper	\$ty disposed of)	\$ Encumbrance of Record \$ Encumbrance of Record aring past year
(D) I have disposed of persona	the Blind): thy net income Cash (free res	Describe personal proper	\$ Market Value \$ Market Value ty disposed of) \$ Market Value	\$ Encumbrance of Record \$ Encumbrance of Record aring past year Income in Kind Cash (free rent,
(D) I have disposed of persona 5. Income (not including Aid to t Current mont	al property consisting of: (che Blind): che Jincome Income in	Describe personal proper	\$ Market Value \$ Market Value ty disposed of) \$ Market Value	\$ Encumbrance of Record \$ Encumbrance of Record aring past year Income in Kind
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(D) I have disposed of persona	the Blind): Cash Income in (free ere food, etc.)	Describe personal proper T Kind II, Source	\$ Market Value ty disposed of) \$ Market Value cotal net income de	\$ Encumbrance of Record \$ Lacumbrance of Record aring past year Income in Kind (free rent, food, etc.) \$
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(D) I have disposed of persona 5. Income (not including Aid to to Current mont Source \$	che Blind): che income che come specified to the statements above sill notify the county author n for self-support. Set sign his t two wit-	Describe personal proper T (ind (ind (ind (ind (ind (ind (ind (ind	\$ Market Value ty disposed of) \$ Market Value otal net income di e \$ n read to me are true mage in my income, p	\$ Encumbrance of Record \$ Encumbrance of Record aring past year Income in Kind (free rent, food, etc.) \$
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(D) I have disposed of persona (D) I have disposed of persona (D) I have disposed of persona (Current mont Source Source I solemnly swear or affirm theowledge and belief; and that I will lition, marital status, address, or plantification, marital status, address, ad	the Blind): the Blind): the blind: Cash (free ref food, etc.) that the statements above s ll motify the county author n for self-support. the stappear. this day of Title.	Describe personal proper T (Sind 1, Source) Source of forth which have been still be promptly of any chains and the second still be promptly of any chains and the s	\$ Market Value ty disposed of)	\$
(D) I have disposed of persona (D) I have disposed of persona 5. Income (not including Aid to to Current mont Source \$	the Blind): the Blind): the Blind): thy net income Cash (free rer food, etc.) that the statements above sill notify the county authorn for self-support. the sign his two witst appear. this day of Title owledge an affidavit ode, as amended by 1939 L	Describe personal proper T (ind 1, Source) et forth which have been tites promptly of any cha	Signature or Market Value s	\$ Encumbrance of Record \$ Incumbrance of Record aring past year Income in Kind (free rent, food, etc.) \$
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State of California	Department of Social Welfare
C	County
	County No
S	State No
RECIPIENT'S AFFIDAV (For use of recipient who changes county resident or Section 3450 of the Welfard	nce under Section 2200 or Section 3090
THIS IS TO CERTIFY, That I,	
left the County ofon	and decided to make my
residence in the County of	on
I made this change for the following	ng reason:
	Signature or mark of affiant (Name to be given as above)
NOTE: When the applicant can not	
sign his name, the signatures of two witnesses to his mark must appear.	Witness to mark
	Witness to mark
Subscribed and sworn to before me this_	day of19
NAME	Title
Signature of County Clerk or person authorized acknowledge an affidavit	i to
Section 6105 of the Government Code davit is necessary in order that a persany agency or department of the United subdivision thereof, no fee shall be characteristic.	States, the State, or any political
Form AB 216, Revised March 1950	

STATE OF CALIFORNIA	DEPARTMENT OF SOCIAL WELFAR
NOTIFICATIO	N OF TRANSFER
	Date
	County No.
	State No.
(A) To	FROM
This is to notify you that	Name of Recipient of:
(Check one) 1. Aid to Needy Blind, 2.	☐ Aid to Partially Self-Supporting Blind Residents,
	a month paid through County of First Residence
	County of First Residence
has moved to your county and is living at	Address in Second County
	Signature of County Worker, First County
	Date
(B) To	From
(B) To	County of Second Residence
병에 이번 이번 경험에 가장 하면 가장 보면 보면 되었다면 하면 하면 하면 하는데 하면 하는데 하는데 하는데 하는데 그리고 있다면 하는데	evestigation we have been able to make to date, it was
found that Name of Recipient	,, established
his residence by union of act and intent in the co	natural
	County of Second Residence t eligibility has continued and it is recommended that
Date Residence Established 2nd Co. Recipient's Affidavit	t engionity has continued and it is recommended that
(Check one) 1. ☐ Aid to Needy Blind, 2. ☐ Aid t	to Partially Self-Supporting Blind Residents, 3. 🗆 Old
	a month. The date for beginning payment of aid
by will be will be	if applicant is otherwise eligible.
	Signature of County Worker, Second County
(C) T	Date
(C) To	County of First Residence
This is to notify you that (Check one) 1	. Aid to Needy Blind, 2. Aid to Partially Self-
Supporting Blind Residents, 3. Old Age Securi	ty, will continue in the amount of \$
a month to	
Name of Recipient	Address
and the date for discontinuance of aid in first con	
unless there is a change in residence or other eligib	ility status.
	Signature of County Worker, First County
DIRECTIONS FOR HANDLING	NOTIFICATIONS OF TRANSFER
county fills out Section (B), retaining 1 copy and returning 3 to	AB 215, retaining 1 copy and sending 4 to the second county. Second the first county. First county fills out Section (C), retaining 1 copy, rraing 1 to the second county with certified copies of original application
and supporting documents.	
nd supporting documents.	28418-4 S-100 25M ① 07

State of California

Department of Social Welfare

NOTICE OF EFFECTIVE DATE OF TRANSFER

		County	
		County No	
		State No	
		Date	
NAME			
ADDRESS	our records. respo	— Onsibility fo	r payment of your aid
will be assumed by the			
on	, 19		
The County of	will disc	continue your	(Indicate type of aid)
			(Indicate type of aid)
on	, 19		

If you have any questions, we suggest that you get in touch with the County Welfare Department in the county where you are now living.

Form AB 218, Revised March 1950

State of California

Department of Social Welfare

NOTIFICATION OF CHAN	GE OF COUNTY RESIDENCE
	County
	County No
	State No
	Date
Name	
Address	
to that county with the intent to make	County that you have moved ce it your future home. Within the near Welfare Department where you are now
	payments will be made from this
(Indicate type of aid)	
county for a temporary period and the will be paid through the county in wh	ereafter, if you remain eligible, they nich you are now living.

It is our desire that aid shall be received continuously and without interruption so long as you remain eligible. Your cooperation is necessary, however, in order that this may be possible. The county which issues a monthly warrant to you must be kept informed of all changes in your address. Should circumstances make it necessary for you to move to a new address before payment of aid is assumed by the county in which you are now living, please notify this department as well as the County Welfare Department where you are now living before you move. Any oversight on your part in notifying proper authorities may result in a delay or interruption in your aid.

In accordance with your sworn statement on your signed application, we urge you to discuss promptly with your local County Welfare Department, any changes in your circumstances or financial condition. This will include reporting of purchase or sale of real or personal property, and any changes in your income from property, responsible relatives, earnings, or any other source. It also includes reporting of changes in your need.

Form AB 217, Revised March 1950

Sections 3088 of the Aid to Needy Blind Law and 3474 of the Aid to Partially Self-supporting Blind Residents Law in the State that the spouse, parents, and adult children of a blind person receiving Aid to the Blind have a dury to contribute to support of such person if they reside in the State and are pecuniarily able to make a contribution. This form is for your in making a full statement of your income and expenses and will enable the country to make a determination of your pecunial bablity to contribute to your relative. Completion of this form in detail is necessary in order that proper consideration can be given to the eligibility of the liciant. After completion, please return this form to— Commy Wilson Department Sections 3088 of the Aid to Needy Blind Law and 3474 of the Aid to Partially Self-supporting Blind Residents Law vide: "If any applicant receiving aid under the provisions of this chapter has residing within the State a spouse, parent, or all this, and the provisions of the Aid to Partially Self-supporting Blind Residents Law vide: "If any applicant receiving aid under the provisions of this chapter has residing within the State a spouse, parent, or all this, and the support of supervisors may request the district attorney to proceed a supervisor may request the district attorney to proceed a supervisor may request the district attorney to proceed a supervisor may request the district attorney to proceed a supervisor may request the district attorney to proceed a supervisor may request the district attorney to proceed a supervisor may request the district attorney	TE OF CALIFORNIA	DEPARTMENT OF SOCIAL WELFARE
STATEMENT OF RESPONSIBLE RELATIVE OF APPLICANT FOR AID TO THE BLIND Name of Applicant Name of Application Name of Application	COUNTY	7 NO
has made request for aid under the Nomes of Applicant Aid to Needy Blind Law Aid to Partially Self-supporting Blind Residents Law. Sections 1085 of the Aid to Needy Blind Law and 1474 of the Aid to Partially Self-supporting Blind Residents Law. Sections 1085 of the Aid to Needy Blind Law and 1474 of the Aid to Partially Self-supporting Blind Residents Law upon the Partial Self-support of such persons if they reside in the Target Self-support of such persons if they reside in the Target Self-supporting Aid at the Blind Self-supporting Blind Residents Law upon the Self-support of Self-supporting Aid at the Self-support of Self-supporting Blind Residents Law and Self-supporting Blind Residents Law and Self-supporting Blind Residents Law and Self-supporting Blind Residents Law indicated to personal Self-supporting Blind Residents Law indicated and Self-supporting Blind Residents Law indicated and Self-supporting Blind Residents Law indicated Self-supporting Blind Law and J474 of the Aid to Partially Self-supporting Blind Residents Law indicated Self-supporting S	COUNTY	
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Aid to Needy Blind Law Aid to Partially Self-supporting Blind Residents Law. Sections 1088 of the Aid to Needy Blind Law and 3474 of the Aid to Partially Self-supporting Blind Residents Law ide that the spouse, parents, and sidult children of a blind person receiving Aid to the Blind have a dury to contribute to support of such person if they reade in the State and are pecuniarily able to make a contribution. This form is for your in making a full statement of your income and expenses and will enable the country to make a determination of your pecuniarily and the state of the stat		le request for aid under the
Sections 1988 of the Aid to Needy Blind Law and 1974 of the Aid to Partially Self-supporting Blind Renidents Law visite that the pupus, parents, and sultic children of a blind person receiving Aid to the Blind have a duty to contribute to support of such person if they reside in the State and are pecuniarily able to make a contribution. This form is for your in making a full statement of your relative. Completion of this form in detail is necessary in order that proper consideration can be given to the eligibility of the licent. After completion, please return this form to— Course Walton Department Sections 1988 of the Aid to Needy Blind Law and 1974 of the Aid to Partially Self-supporting Blind Residents Law vide: 'If any applicant receiving aid under the provisions of this chapter has residing within the State a spouse, parent, or it child, pecuniarily able to support him, upon the failure of such kindred to perform their duty to support the blind person board of supervisors may request the district attorney to proceed against the kindred The district attorney may, on behalf of the country, maintain an action in the superior cours against much relative so relative pecuniarily able to support him, upon the failure of such kindred to perform their duty to support the blind person board of supervisors may request the district attorney to proceed against the kindred The district attorney may, on behalf of the country, maintain an action in the superior cours against such relatives (1) to recover . nuch portion of the aid granted as the courts find such relative or relative pecuniarily able to upport the blind person who, in order to secure for himself or abother the aid provided in this chapter, makes a false statement of requiring the support of a supervisor required the applicants for aid, do make the following answers to the questions printed below relative to my pocuniary literature. It was a supervisor and the support of the support of the support of the support of the suppo	Name of Applicant	at reducer you and among any
wide that the spouse, parents, and adult children of a bland person recturity able to make a constribution. This form is for your in making a full statement of your income and expenses and will enable the country to make a determination of your pecunisms and person recturity able to make a determination of your pecunisms. Completion of this form in detail is necessary in order that proper consideration can be given to the eligibility of the liciant. After completion, please return this form to— Commy within Department Sections 3048 of the Aid to Needy Blind Law and 3474 of the Aid to Partially Self-supporting Blind Residents Law vide: "If any applicant receiving aid under the provisions of this chapter has residing within the State a spouse, parent, or all child, pecuniarily able to support the blind person board of supervisors may require the district attorney to proceed gainst the kindred The district attorney may, on behalf of the country, maintain an action in the superior court against such relative s (1) to recover a such portion of the aid granted as the courts find such relative or relative pecking and the superior court against such relative s (1) to recover a such portion of the aid granted as the courts find such relative or relative pecking and the superior of the aid granted as the courts find such relative or relative pecking and the superior of the aid granted as the courts find such relative or relative pecking and the relative shall be deemed guilty of perjury. Whenever any person has by means of false statement or representation or by personation or other fraudulent device obtained aid under this chapter, he shall make restriction and all actions necessary to use restrictions may be brought against him." STATEMENT OF RESPONSIBLE RELATIVE I, Name Novem Addesse STATEMENT OF RESPONSIBLE RELATIVE I, Name Novem Addesse (If you are a married daughter) Amount of Deposits Have you as Interest in real estate other than your home? Amount of Deposits Have you on a inte	Aid to Needy Blind Law Aid to Partially Self-supporting Blind Residents Law.	
Conserved Mater Completion, please return this form to— Conserved Mater Department Materia	ovide that the spouse, parents, and adult children of a blind person receiving Aid to the blind e support of such person if they reside in the State and are pecuniarily able to make a contril e in making a full statement of your income and expenses and will enable the country to make a contribute to your relative.	oution. This form is for your letermination of your pecuni-
Sections 3088 of the Aid to Needy Blind Law and 3474 of the Aid to Partially Self-supporting Blind Residents Law "iff any applicant receiving aid under the provisions of this chapter has residing within the State a spouse, parent, or alt child, pecuniarly able to support him, upon the failure of such kindred to perform their dury to support the blind person bard of supervisors may request the district attorney to proceed against the kindred The district attorney may, on behalf of the county, maintain an action in the superior court against such relatives (1) to recover such portion of the aid granted as the courts find such relative or relative pecuniarily able to pay and (2) to secure an er requiring the payment of any sums which may become due in the future for which the relative may be liable" Responsible relatives of applicants for aid under the Aid to Blind Laws should give consideration to Sections 3006 and 53, which sections read: "Any person who, in order to secure for himself or another the aid provided in this chapter, makes a false statement or capter and the coath, shall be deemed guilty of perjury. Whenever any person has by means of false statement or representation or other fraudulent device obtained aid under this chapter, he shall make restitution and all actions necessary to ure restitution may be brought against him." STATEMENT OF RESPONSIBLE RELATIVE I,	Completion of this form in detail is necessary in order that proper consideration can be plicant. After completion, please return this form to—	given to the eligibility of the
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Responsible relatives of applicants for aid under the Aid to Blind Laws should give consideration to Sections 300.6 and 205, which sections read: "Any person who, in order to secure for himself or another the aid provided in this chapter, makes a false statement der oath, shall be deemed guitty of perjury. Whenever any person has by means of false statement or representation or by personation or other fraudulent device obtained aid under this chapter, he shall make restitution and all actions necessary to ure restitution may be brought against him." STATEMENT OF RESPONSIBLE RELATIVE I,	ult child, pecuniarily able to support him, upon the failure of such kindred to perform their due e board of supervisors may request the district attorneyto proceed against the kindre may, on behalf of the county, maintain an action in the superior court against such such portion of the aid granted as the courts find such relative or relatives pecuniarily able or requiring the payment of any sums which may become due in the future for which the	cy to support the blind person d The district attorney relatives (1) to recover to pay and (2) to secure an e relative may be liable"
"Any person who, in order to secure for himself or another the aid provided in this chapter, makes a false statement der oath, shall be deemed guilty of perjury. Whenever any person has by means of false statement or representation or by personation or other fraudulent device obtained aid under this chapter, he shall make restitution and all actions necessary to ure restitution may be brought against him." STATEMENT OF RESPONSIBLE RELATIVE I, Nume Street Address	Responsible relatives of applicants for aid under the Aid to Blind Laws should give cons 105, which sections read:	deration to Sections 3006 and
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City		
City of Person, See, or Designation of Cites band, Wife, Person of Cites band, Wife, P		
e above named applicant for aid, do make the following answers to the questions printed below relative to my pecuniary lity to assist said applicant: Are you a married daughter? TW No (If you are a married daughter, see NOTE on reverse side of this form.) DEPENDENTS There are persons dependent upon my income including myself but not including the applicant. ASSETS Do you or your spouse own your home? Assessed Value \$ Have you an interest in real estate other than your home? Amount of Deposits Have you postal savings? Do you own stocks, bonds, mortgages or other securities? Value Do you own cash? Do you have other assets? (Specify) Value Value Value Value Value OBLIGATIONS Is there a mortgage on your home? Is there a mortgage on other real property in which you own an interest? Amount Amount Amount Amount Amount Amount Amount Amount	I,	vet Address
Lity to assist eaid applicant: Are you a married daughter? To No (If you are a married daughter, see NOTE on reverse side of this form.) DEPENDENTS There are persons dependent upon my income including myself but not including the applicant. ASSETS Do you or your spouse own your home? Assessed Value Have you an interest in real estate other than your home? Amount of Deposits Have you potal savings? Do you own stocks, bonds, mortgages or other securities? Value Do you own stocks, bonds, mortgages or other securities? Value Oyou own stocks? (Specify) Value Value OBLIGATIONS Is there a mortgage on your home? Is there a mortgage on other real property in which you own an interest? Amount	I,, Sums ,, Sums ;, County of, State of	veet Address
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DEPENDENTS There are	I,	uet Address
There are	I,	ue Addeus low relative to my pecuniary
AssertS Do you or your spouse own your home?	I,	ue Addeus low relative to my pecuniary
Do you or your spouse own your home?	I,	nn Address llow relative to my pecuniary
Do you or your spouse own your home?	I,	nn Address llow relative to my pecuniary
Have you an interest in real estate other than your home? Assessed Value Have you a bank account? Amount of Deposits Have you postal savings? Amount of Deposits Do you own stocks, bonds, mortgages or other securities? Value Do you own cash? Value Do you have other assets? (Specify) Value Value OBLIGATIONS Is there a mortgage on your home? Amount Is there a mortgage on other real property in which you own an interest? Amount List outstanding obligations other than current household bills (chattel mortgage or personal loans, medical or dental bills, etc.) Amount Amount Amount Amount	I,	nn Address llow relative to my pecuniary
Have you a bank account? Have you potal savings? Amount of Deposits Do you own stocks, bonds, mortgages or other securities? Value Do you own cash? Value Value Value Value Value OBLIGATIONS Is there a mortgage on your home? Is there a mortgage on other real property in which you own an interest? Amount List outstanding obligations other than current household bills (chattel mortgage or personal loans, medical or dental bills, etc.) Amount Amount Amount Amount Amount	I,	not Address dow relative to my pecuniary m.) the applicant.
Have you postal savings? Do you own stocks, bonds, mortgages or other securities? Value Do you own cash? Do you have other assets? (Specify) Value Value Value Value Value Value Value Value Value OBLIGATIONS Is there a mortgage on your home? Is there a mortgage on other real property in which you own an interest? Amount List outstanding obligations other than current household bills (chattel mortgage or personal loans, medical or dental bills, etc.) Amount Amount Amount Amount	I,	low relative to my pecuniary 78.) the applicant. I Value \$
Do you own cash?	I,	low relative to my pecuniary m.) the applicant. I Value \$
Do you have other assets? (Specify)	I,	with Address and Address and Property of the second of t
OBLIGATIONS Is there a mortgage on your home? Is there a mortgage on other real property in which you own an interest? Amount List outstanding obligations other than current household bills (chattel mortgage or personal loans, medical or dental bills, etc.) Amount Amount Amount Amount	I,	not Address and Address and Address and Part of the Address and Par
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Is there a mortgage on your home?	I,	low relative to my pecuniary m.) the applicant. I Value \$
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State of California	Department of Social Welfare
	County
	Case Name
	County No.
	State No.
	AFFIDAVIT REGARDING RESIDENCE OF APPLICANT
	Aid to the Blind
Section	on 118a of the Penal Code, 1937:
118a.	False Affidavits as to Affiant's Testimony
	Any person who, in any affidavit * * * swears, affirms, declares, deposes, or certifies * * * as true any material matter which he knows to be false, is guil ty of perjury.
THIS	IS TO CERTIFY, THAT I,
Ilving atStre	eet and Number City , County of
State of Califo	ornia, have known, an applicant for Name of Applicant
	nd, foryears and know that he/she has resided in
California cont	tinuously foryears from the yearto the year
and in the Cour	nty offorimmediately preceding the date of Length of time
this affidavit.	. I have personal knowledge of the applicant's residence for
the following n	reasons:
(SIGN	NATURE OF AFFIANT)
Subscr	ribed and sworn to before me thisday of19
	Signature of County Clerk or Person Qualified to Acknowledge an Affidavit
Section in order that a pers	on 6105, Government Code, provides: "Whenever an cath or affidavit is necessary on may obtain charity or relief from any agency or department of the United or any political subdivision thereof, no fee shall be charged for the taking of
Form B1 221, Novembe	r 1950 .

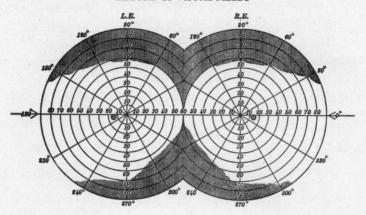
Stat	tus New Application		County
	Reinvestigation		Former State Number If a Transfer
	Reapplication		
	Physician's Repo	rt of Eye Ex	amination
	THIS REPORT, TO BE VALID,		
1.	Applicant's Name	2. Sex	3. Race
4.	Address		
s.	Date of birth	onset of impaired vision: Ri	ght eyeLeft eye
7.	Residence at onset of impaired vision: Right eye	L	eft eye
8.	Eye pathology primarily responsible for impaired vision Right eye:		
	Left eye:		
9.	Secondary pathological conditions, if any Right eye:		
	Left eye:		
10.	Etiological factor responsible for primary eye pathology Right eye:		
	Left eye:		
11.	If there is a history of eye injury or operation, state type Right eye:	e and date	
	Left eye:		
12.	Describe briefly all pathological eye findings		
	Right eye: Cornea		
	Iris		
	Pupil		
	Lens		
	Vitreous Retina and choroid		
	Optic Nerve		
	Left eye:		
	Cornea Iris		
	Pupil		
	Lens		
	Vitreous		
	Retina and choroid Optic Nerve		
	CENTRAL VISUAL ACUITY—Use Snellen notation read the "200-foot" letter on the Snellen Chart at a distathe visual acuity as 3/200, or 6/200, etc., with the nut indicating the standard letter he is able to read. If applicant is unable to read the largest letter report "Hand Movements" (H.M.) at the determined dist If he is unable to see "Hand Movements" report "Make definite statements if possible. Symbol	ance of 20 feet, he should app innerator indicating the distant on the Snellen Chart from a tance. Let "Light Perception" (L.P.,	orach the chart until he can read it. Report nee at which he reads, and the denominator any distance, but can see hand movements, or "No Light Perception" (No L. P.).
	"blind," "objects," "fingers," "00/200" must not be use Distance (20 feet) Near (14 inches)	sed. Use AMA reading card	in determining near vision. (20 feet) Near (14 inches)
WIT	THOUT GLASSES		(10 Int)
	rt eye (13a)(13b)	Left eye (13c)	(13d)
VIT	TH PRESENT GLASSES		
ligh	t eye (13e)(13f)	Left eye (13g)	(13h)
	t eye (13i)(13j)	Left eye (13k)	(13L)
REF	RACTION RECORD—To be recorded in all cases when		
ligh	SPHERE CYLINDER t eye	AXIS	- VISUAL ACUITY

4. MONTHLY INCOME		
What is your total monthly salary or	earnings?	
	/ Stocks and bonds?	
What income do you receive from-	Net rentals?	
what income do you receive from—	Pensions or compensation?	
	Other income? (Specify)	
Total Monthly Income	FROM ALL SOURCES	\$
5. MONTHLY EXPENSES		
Rent or monthly payment on home .		
Property taxes or assessments (month	bly prorata)	
Income taxes (monthly prorata)		
	lary (Social Security, unemployment, etc.)	
Utilities (average)		
Food (average)		
Insurance (monthly prorata of all pre		
Clothing and incidentals		
other obligations—monthly pron	personal loans, medical or dental bills or	
Other unusual expenses (explain) .		
Contributions to dependents other tha	n those living in your household—	
Name	Age Relationship	
6. CONTRIBUTION TO APPLICA	NT	\$
I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of	NT pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kind	
I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of Free rent (estimated value)	NT pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kind	
I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of . Free rent (estimated value) Free board (estimated value)	pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kind	
I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of . Free rent (estimated value) Free board (estimated value) Free room and board (estimated value)	pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kind the type of assistance given.	
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I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of . Free rent (estimated value) Free board (estimated value) Free room and board (estimated value)	pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kind the type of assistance given.	
I am at present contributing to this a County Welfare Department. (Check no contribution, write "none." Cash in the amount of Free rent (estimated value) Free board (estimated value) Free room and board (estimated value) Other (specify)	NT pplicant each month and will continue this contribution the type of assistance given.) If contribution is in kine \$	
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State of California	Department of Social Welfare
AUTHORIZAT	ION FOR FINANCIAL INVESTIGATION
	County No.
T	Name of County Worker
Ι,	
residing atStreet Numbe	California,
hereby authorize release to	the bearer, a representative of the County Welfare
Department of	County, any and all information regard-
	balances pertaining to any bank, postal savings,
building and loan or trust	accounts, which I, or my spouse either separately
or jointly now have or may h	ave had in the past. I also authorize release of
information regarding any c	ollateral held as security for loans advanced to
me or my spouse or of the ex	istence of a safe deposit box, or any stocks and
bonds that I, or my spouse e	ither separately or jointly own or have owned in
the past,	
I further authorize the	bearer to be given information regarding any in-
surance that I have or may	have had, or any insurance that my spouse has or
may have had with any insu	rance company, fraternal organization, union, or
benefit society. Authoriza	tion is also given for release of information
available from the records of	f the Bureau of Old Age and Survivor's Insurance
and from the records of the	Department of Employment regarding Unemployment
Benefits.	(GTOMED)
	(SIGNED)Signature of applicant
	Birthplace
	Birthdate
	Maiden name of mother
	(SIGNATURE OR NAME OF SPOUSE)
	Birthplace of spouse
	Birthdate of spouse
	Maiden name of spouse's mother
Da te	19
Form AB 228, Revised July 1948	

14. PERIPHERAL VISION must be recorded in all cases where central vision with or without best possible correction is greater than 20/200. The test object should be of such size that it subtends an angle of approximately one degree. (6 mm. test object at a distance of 13 inches.)

RECORD OF VISUAL FIELDS



5. Recommendations In all cases where surgery is recommended, the following reports are required: a. Macular function (2 point light test—the minimum distance of separation at which two points of light can be recognized.
. In all cases where surgery is recommended, the following reports are required: a. Macular function (2 point light test—the minimum distance of separation at which two points of light can be recognized.)
보고 있는 사람들이 다른 아이들은 아이들이 되었다면 하는데 보고 있는데 하는데 이 사람들이 아이들이 아이들이 아이들이 아이들이 아이들이 아이들이 아이들이 아
b. Light projection fields (chart light projection field under Item No. 14 above).
. When should applicant be reexamined?
*** * * * * *
EMARKS:
ATE OF CALIFORNIA
COUNTY OF
This Is To Certify, That I am a duly licensed and practicing physician skilled in diseases of the eyes; that on the
the condition of applicant's eyes, and of the degree of impairment of vision.
[SIGNATURE OF
EYE PHYSICIAN]
Address
I HEREBY CERTIFY, That I have reviewed the foregoing report of eye examination and find that the facts contained the we the visual impairment of the person named in this report to come within the definition of blindness as adopted for use in Californ the administration of the Aid to the Blind Laws.
te

39492-FF 2-51 3M SPO

State of California

Department of Social Welfare

CERTIFICATE OF DELIVERY OF PAYMENT OF AID

To: State Department of Social Welfare 616 K Street Sacramento, California

	County
	County No
	State No
	Date
This Is To Certify, That	
	Name of recipient
left	on
Institution	Date
and that on	I personally delivered to the
above-named grantee, Warrant No	in the amount of \$for
the month of	, representing aid provided under the
Indicate type of aid	
I further certify that at the	time and place of delivery of this
warrant that recipient was not an inm	ate of a public institution.
(s	ignature)
	Title

Note. -- This form is to be completed and certified by the person delivering the second month's warrant to an applicant who was in a public institution when his application was granted and who received the warrant for the first month for which aid was granted while an inmate of the institution.

One copy to be forwarded to State Department of Social Welfare, 616 K Street, Sacramento

Form AB 231, Revised March 1950

Aid to

the

Blind

H ORM

BL 230

DEPARTMENT OF SOCIAL WELFARE

One copy to accompany Bl 200 to SDSW

[SIGNATURE OF PERSON COMPLETING FORM]

Date card completed.

FORM BL 230 (revised) -Sept., 1949

STATE OF CALIFORNIA

NOTE.—Entries on this form will not necessarily be identical with those on FORM BL 201, Certificate of Eligibility

35200-28 10-50 3M ② SPO

2. State case number 6. NAME OF APPLICANT_ 3. County case number. 4. Date of this application 7. ADDRESS 5. Date of this approval_ Board of Supervisors' action Street City, town or village (Upon receipt of first grant) 24. Other public or private assistance approved in household of applicant for this individual or for any other member 8. Sex (circle one): a. Male 18. Living arrangements to be effective when first payment is received (circle one): b. Female of the household, except lodgers, to be received simulta-neously with Aid to the Blind (circle each type of aid 9. Race (circle one): Manual Sec. 287-05 a. Alone (living alone in house or apartment, living alone in furnished room and eating elsewhere, received): Manual Sec. 287-90 2. White c. Mexican living in furnished room and cooking own meals) b. Negro d. Other (specify). a. None b. With spouse only 10. Date of birth. b. Aid to Needy Children c. With parents Manual Sec. 287-10 c. Old Age Security d. With adult children d. General Relief e. With other relatives or friends 11. Place of birth. e. Another Blind Aid grant. f. In boarding home for aged Manual Sec. 287-15 State; country if foreign-born State case number 12. Citizenship (circle one):
Manual Sec. 287-85 g. In institution f. Other public assistance... h. Other (specify). a. Citizen b. First papers c. Alien 19. Instruction in handicraft, Braille, typing, etc. (circle one): g. Private agency 13. Total years in California. h. Unknown a. Now receiving instruction 14. Place where last spent one year prior to coming to Calib. Has received instruction c. Never received instruction fornia Manual Sec. 287-25 20. Is interested in (circle each kind): State: country if foreign Status of case: Manual Sec. 287-57 15. Was case receiving public assistance from another state during the last 12 months while living in California? a. Rehabilitation training Amount of this grant \$ b. Employment (circle one) Manual Sec. 287-30 Other income c. Instruction in handicraft, Braille, typing, etc. a. Yes c. Unknown d. None b. No 21. Personal property (if none, write "none"): State 16. Present marital status (circle one): a. Cash: Amount \$_ Manual Sec. 287-35 a. Single b. Securities: Total value \$___Encumbrances \$__ d. Married, living with spouse b. Widowed e. Married, not living with spouse c. Other: Total value \$ ____ Encumbrances \$___ Education and Employment c. Divorced 22. Life insurance (circle applicable items): a. Education (circle the highest grade or year completed): 17. Source of support during 12 months immediately prior to Grade school 1 2 3 4 5 6 7 8
High School 9 10 11 12 this application (circle each kind received): a. None b. Owns exempt policy a. Own earnings c. Owns non-exempt policy b. Savings b. Rehabilitation Training (circle one): 23. Real property (if none, write "none"): c. Spouse (1) Now receiving training d. Children a. Total assessed value \$__ Manual Sec. 287-60 (2) Has received training e. Parents b. Total amount of encumbrances \$_ Manual Sec. 287-65 f. Allotments and allowances from men in armed (3) Never received training services c. Nature of property (circle applicable items):
Manual Sec. 287-70 c. Employment (circle one): g. Public assistance (specify)_ (1) Engaged in own enterprise h. Other (specify)_ (1) Applicant's home (2) Employed by another (2) Other improved property i. Unknown (3) Not engaged in own enterprise or employed by (3) Unimproved property Specify chief source of support_ (4) Other (specify)

Social Data Record Card-Aid to the Blind

1. COUNTY_

State of California	Department of Social Welfare
	PARTMENT OF MENTAL HYGIENE OF
APPLICANT'S RELEASE	FROM STATE HOSPITAL
SECTION I	
To:	_ County
	Name of Applicant
Address	
	_ State No County No
	Date
SECTION II	
THIS IS TO CERTIFY, That	Name of Applicant was released on
Name	of State Hospital Date
and will reside at	Address
	State Department of Mental Hygiene
All the second of the second o	by
	Signature of Social Worker
SECTION III	
THIS IS TO CERTIFY, That on	, Warrant No
	Date
in the amount of \$, for	the month of, was delivered.
	Signature
	Digita out 6
	Title
NOTE: Section I is to be completed in triplica	te by the county granting the application, and for-
warded to the State Hospital.	dial Worker in the State Hospital, and two copies of
the form must be returned to the county	before the warrant may be released. unty before sending one copy of the Form 235 as re-
The county shall forward one copy to the Sacramento 14, California.	State Department of Social Welfare, 616 K Street,
Form AB 235, January 1950	

	ORNIA		NOTICE (OTTANCE	DEPA	ARTMENT OF SOCIAL WELFARI
				OF CHANGE the Blind		
7.1.4						
for discont	inuances (includ	ding discontin	nt of Social Welfare nuance of payment			
to county i	for hospital or in	firmary care)), restorations, and	County	County No.	State No.
copy for o	other changes. S	SUBMIT ON	E COPY OF ALL	NAME	The state of the s	
CHANGES	TO COUNTY	AUDITOR.		J		
	d under (Check on		☐ APSB	DATE		
SEC. I. Aid	to the Individu		INCOME OTH	ER THAN AID TO BLIND	TOTAL IN EX	
Change	Effective Date of Change	Aid to Blind Grant From Date of Change		Sources and Amounts of Income	Total Need	KCESS OF MAXIMUM GRANT Nature and Amount of Each
(1)	(2)	Change (3)	Total Income Other Than Aid to Blind (4)	(8)	(6)	Nature and Amount of Each Excess Need and How Verified (7)
REASE					100	
REASE						
REASE						
TORATION						
NSFER FROM: NB TO APSB						
OR PSB TO ANB						
PSB TO AIRE						
ONTINUANCE		Sec. II and Secompleted for	ec. III must be Discontinuances			TOTAL
REASON FO	R CHANGE-	Ruceht Discontin	wance: (Give date of m	elease from institution if restor	(- skie mason)	
Income to	nings of recipient			months i	farm date of	
2. Earr 3. Earr 4. Oth 5. Con 6. Con	nings of spouse er resources of spo tribution from par tributions from or	rents or adult o	children			of admission ustodial care)
2. Earr 3. Earr 4. Oth 5. Con 6. Con 7. Inco	nings of spouse er resources of spo tribution from par tributions from ot ome from property	rents or adult of thers (Specify)		☐ More than ☐ 15. Admitted to c Date	2 months from date county infirmary (Co	of admission ustodial care)
2. Earr 3. Earr 4. Oth 5. Con 6. Con 7. Inco 8. Inco Non-income	nings of spouse er resources of spot tribution from partributions from ot ome from property ome from other source reasons:	rents or adult of thers (Specify)urces (Specify))	More than 15. Admitted to c Date 16. Admitted to o Date	2 months from date county infirmary (Co	of admission ustodial care) ion.
2. Earr 3. Earr 4. Oth 5. Con 6. Con 7. Inco 8. Inco Non-incom 9. Subs	nings of spouse er resources of spo tribution from par tributions from ot ome from property ome from other sou e reasons: sequent information	rents or adult of thers (Specify) urces (Specify) on disproves		☐ More than ☐ 15. Admitted to c ☐ Date	2 months from date county infirmary (County infirmary) ther public institution Name of Institution APSB	of admission ustodial care)
2. Earr 3. Earr 4. Oth 5. Con 6. Con 7. Inco 8. Inco Non-incom 9. Subsestat 10. Char	nings of spouse er resources of spouse tribution from por tributions from ot ome from property ome from other sou e reasons: equent informatic blished (Explain be ange in law or policy	rents or adult of thers (Specify) urces (Specify) on disproves of elow) ry (Specify))—————————————————————————————————————	More than 15. Admitted to c Date 16. Admitted to o Date 17. Accepted for [18. Loss of State re	2 months from date county infirmary (County infirmary infirmary). There public institution institution in the public inst	of admission ustodial care) ion. □ OAS
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NOTIFICATION OF SUSPENDED (WITHHEI Aid to the Blind	LD) AID PAYMENTS
	_ County
To:	State Number
	County Number
	Date
	District
Your Aid to the Blind warrant for the month suspended (withheld) pending completion of investo receive it. This action was necessary because	stigation of your eligibility
	-W
Every effort is being made to complete the you are found eligible to receive the warrant is wise the aid can not be paid.	t will be sent to you. Other-
Aid is granted on the basis of your present with the existing law. The amount of your aid your circumstances change.	
If you do not understand this notice, or are taken, contact the County Welfare Department location discussion of any questions involved.	e dissatisfied with the action ated at Y WELFARE DEPARTMENT
By	

FORMS

An applicant or recipient who is dissatisfied with the action taken upon his application, or with respect to the amount of aid granted may request a hearing before the Board of Supervisors, but such request must be filed with the County Board of Supervisors within 30 days from the date of this notice. (Welfare and Institutions Code, Sections 3087.5 and 3473.2.)

The applicant or recipient who is dissatisfied with the action taken on his application, or with respect to the amount of aid granted may appeal directly to the State Department of Social Welfare, 616 K Street, Sacramento, but if a hearing before the Board of Supervisors has been requested, an appeal may not be filed with the State Department of Social Welfare until after the decision of the Board of Supervisors has been rendered. (Welfare and Institutions Code, Sections 3088.5 and 3474.5.)

An appeal to, or a request for a hearing before the Social Welfare Board shall be made within one year after the date of the action with which the applicant or recipient is dissatisfied. (Welfare and Institutions Code, Section 104.5.)

IMPORTANT: Information for all recipients of Aid to the Blind:

Should circumstances make it necessary for you to move, it is wise to inform your County Welfare Department before you move, either out of the county or to a new address within the county. Otherwise, there may be an unavoidable delay or interruption in the receipt of your aid.

When you signed your application, you agreed to discuss promptly with your County Welfare Department any changes in your circumstances or financial condition. This will include discussion of purchase or sale of real or personal property, and any changes in your income from property, earnings, or any other source.

Form Bl 239-A, Revised March 1950

NOTIFICATION OF AC		
	TION BY THE	BOARD OF SUPERVISORS
AID	TO THE	BLIND
		County
		COUNTY
TO:	-	
	1	State Number
		County Number
	1	Date District
The County Board of Supervisor lations of the State Board of Social Weld	rs, in accordance fare, acted upon	with the State law and the Rules and Regu- your application for
☐ Aid to N	eedy Blind	
☐ Aid to Pa	rtially Self-suppo	orting Blind Residents
as stated below:	relainy Self-suppo	iting bind Residents
Application granted beginning	in in	the amount of \$ Total need \$
Source and amount of income which	was subtracted	
2. Application denied	OR	
2. Application defined		
Because		
the state of the s		
	OR	
3. The County Board of Supervisors cha		your Aid to the Blind as shown below:
A:1 DECREASED (INCREASED	D besieving	to \$ Total need \$
(cross out one)	D beginning	to \$ to a lotal need \$
Source and amount of any income wh	nich was subtracted	
Source and amount of any income wh		
	OR	
Source and amount of any income wh 4. Aid was STOPPED (date)	OR	
	OR	
4. Aid was STOPPED (date)	OR	
4. Aid was STOPPED (date)	OR	
4. Aid was STOPPED (date)	OR	
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The grant of aid, or any change in the a the present law. The amount of aid granted may be If you do not understand this notice, or Welfare Department located at	amount of aid, is base changed when there are not satisfied with Country By	d on your present circumstances, and is in accord with a change in your circumstances. the action of the Board of Supervisors, see the County to discuss any questions you have. WELFARE DEPARTMENT The cition is necessary on your part unless you are not upon his application for aid or with the amount ra within 30 days or he may appeal to the State State Department of Social Welfare, 6:16 K Street, a Department before you move, either out of the check might be held because the County Welfare as County Welfare Department about any changes real or personal property, income from property.

State of California	a Department of Social Welfare
NOTICE OF F	FINDINGS AND ACTION ON PHYSICIAN'S REPORT OF EYE EXAMINATION
Report of Dr.	Case Name
Date of Eye Ex	camination Case Number Bl Date
	Re-examination necessary at time of annual reinvestigation. Re-examination necessary Re-examination not necessary at time of annual reinvestigation, except as outlined in Manual Sec. 180-50. Ineligible on basis of degree of blindness. Visual acuity exceeds department's definition of blindness. Examining physician questions degree of disability. Examination by another examiner requested. Examination by State Ophthalmologist requested. Action on this report withheld. Examining Physician questions degree of disability. Other reason
. T	Signature of State Ophthalmologist
clarifiéd with	This section is used only when eligibility is questioned and/or n regard to degree of blindness by findings above.
_ 1. W	Withhold grant for month of(See Manual Secs. 361-40 and 180-20).
	Release grant for month ofif otherwise eligible.
□/ 3. I	Refer for additional eye examination. (See Manual Sec. 361-40).
4. H	Refer to Dr for confirming examination and forward attached report/reports to him.
5. I	Refer to State Ophthalmologist for examination.
☐ 6. I	Discontinue grant.
	Perry Sundquist, Chief Division for the Blind
Form Bl 263, Janua	ary 1950

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